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ABSTRACT

A study of continuing education needs assessment procedures for use by clergy identified and examined eight plans which have as their primary aim the development of individualized plans for professional development. Telephone interviews were conducted with ninety-one randomly selected individuals who had each used one of the procedure . The eight plans examined were (1) Guide for Continuing Growth (Academy of Parish Clergy): (2) Needs Assessment Program (Notre Dame Center for Human Develcpment): (3) Survey of Resources for Development in Ministry (Lancaster Center for Professional Development): (4) procedure from United Theological Seminary, Dayton, Ohio: (5) Proficiencies Objectives (Lutheran Theological Southern Seminary): (6) Parish Ministers Guide to Planning for Continuing Education (United Church of Christ): (7) Professional Assessment Process (Garrett-Evangelical Theological Seminary): and (8) Growth in Ministry--Model A Workshop (Lutheran Church of America). Major areas of questioning concerned what had prompted individual clergy to embark cn the process, what components seemed most helpful, what educational plans or other changes had been made, and what had helped or hindered their follow-through with the plans. It was concluded that the procedures do increase participants' level of intentionality and focus in continuing education, especially when people participate with judicatory support in a group process with a facilitator, printed instruments, peer and lay feedback, and follow-up. (Appendixes include interview instructions, format, and results.) (YLB)

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PLANNED CONTINUING EDUCATION:

a study of needs assessment processes

CE 023 717

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ASSESSMENT PROCESSES IN THIS REPORT:

A - The Academy Plan (Guide for Continuing Growth, Academy of Parish Clergy)

B - The Notre Dame Plan (Needs Assessment Program, Center for Human Development)

C - The Lancaster Plan (The Survey of Resources for Development in Ministry, Center for Professional Development)

D - The United Seminary Plan (Procedure from United Theological Seminary, Dayton, Ohio)

E - The Lutheran Southern Seminary Plan (Proficiencies Objectives, Lutheran Theological Southern Seminary)

F - The UCC Plan (Parish Ministers Guide to Planning for Continuing Education)

G - The Garrett Plan (Professional Assessment Process, Garrett-Evangelical Theological Seminary)

H - The LCA Plan (Growth in Ministry - Model A Workshop)

(See page 7 for descriptions)

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Under a contract with the Needs Assessment Task Force of SACEM, the research was managed by the Alban Institute, Inc., Mount St. Alban, Washington, DC 20016. The Alban Institute work was directed by Loren B. Mead, assisted by Celia Allison Hahn.

I. THE CONTEXT FOR THIS STUDY

The need to offer clergy help in planning their personal and professional development became apparent soon after clergy continuing education became a major concern in the churches and seminaries of the United States and Canada.

The idea that pastors and other ministers should be lifelong learners is hardly new. A century ago the pastor's library was likely to be the most extensive private library in the community and congregations expected their pastors to be spending long hours in their studies. Early in this century a number of colleges, seminaries and church bodies were holding conferences and offering short courses especially designed for clergy. All of us have known parish pastors who have continued to be diligent students long after their formal education was completed--and they never even knew the term "continuing education."

By the mid 1960s, continuing education became a self-conscious movement in the church as well as in society generally. Churches began to make formal provisions for pastors to be away for study leaves and there was rapid growth in the number and types of study opportunities which churches, seminaries and other agencies were making available to the clergy. Many pastors now had a name, and a plethora of resources, for doing what they had been doing all along. Others found their denominational leaders, and often their congregations as well, providing various kinds of support and encouragement for their continued learning and growth. The United Methodist Church in particular implemented its concern for the continuing education of clergy by making explicit and substantial provision for it in its program of financial support of theological education generally.[1]

Within only a few years, a number of people began developing resources to help individual ministers and groups of clergy to be more systematic and deliberate in choosing the particular educational programs in which they would participate. There was no high level decision that such resources should be developed. Rather certain continuing educators, acting independently, began responding to a variety of concerns growing out of their experience.

There was, first, the disturbing observation that many pastors seemed to be signing up for programs in a rather haphazard way, almost as if their choices depended on what attractive brochure arrived on their desks at the moment they most needed a break from their normal routines. If not that, there seemed to be very little attention being paid to developing an overall plan for their continuing professional development.

At about the same time, in the late 60s, there began to be a surge of interest in "consumer-controlled education" on many levels. Voices were raised to challenge the idea that professors on college and seminary campuses (or bureaucrats in denominational offices) knew just what subjects and issues practicing pastors should study and how they should be studied. There is of course always some measure of consumer control of any education where students are free to sign up or not. No continuing education center will be in business very long if the programs it offers are not meeting some of the needs of its poten-

tial students. But as soon as continuing educators agree that a substantial measure of consumer control is educationally desirable, and not just a reality of the market place, there needs to be provided some means by which the prospective students can identify and articulate their learning needs.

A third motivating factor in the development of needs assessment procedures has been the conviction that adults can and should take responsibility for their own education. This idea is implicit in any openness to consumer-controlled education. But now the educator has a new role. The task is not simply one of seeking to discover what students see as their primary learning needs but to enable adults, who have been conditioned by their earlier experience to be passive recipients, to become the primary actors. Students are to be self-learners, even self-teachers, who have some confidence that they know what their own learning needs are and who turn to schools, faculties and other experts as resources to help them with their learning. When this is the larger purpose, more is needed than simple needs assessment. The students need help in gaining a wider and deeper understanding of their personal and professional strengths and weaknesses and of the kinds of teaching/learning settings and methods most appropriate in their situations. Most are apt to feel more confidence about their career plans and learning goals if the decisions are made with the help of others: a counselor or advisor, professional and/or lay colleagues, and perhaps some objective tests or other written instruments. Thus the more elaborate procedures for helping pastors in planning for their professional development are those developed by continuing educators committed to the idea that adults can and should take responsibility for their own education.

At the same time, denominational leaders began expressing their concern that pastors should be held accountable to their congregations or judicatories for taking advantage of, and using responsibly, the opportunities and resources available to them, including the provisions of time and money for study leaves, which were becoming increasingly common in pastoral calls. As a result a number of denominations or judicatories began seeking ways by which pastors could be encouraged and guided as they developed plans for their own continued learning and growth.

Another closely related development has been the establishment of career development centers. Beginning with the Northeast Career Center in Princeton, New Jersey, established in 1965 by the United Presbyterian Church, there soon came to be a network of similar centers in widely scattered locations and serving clergy of many denominations.[2] These centers were designed to enable clergy to take an over-all look at their personal and professional selves, to assess possible career changes, and to chart the directions in which they saw themselves moving, or desiring to move, in future years.

In early years, many of the clients at the centers were people in some kind of crisis situation, either in their personal lives or the situations in which they were located. Some found at the centers a helpful way to move from a church to a secular occupation. Many others found their callings to ministry

confirmed and were able to make a fresh commitment to professional ministry. The centers, however, did not see themselves as offering help only to people in such crisis situations but as a resource for clergy generally in becoming more intentional about themselves and their careers. Over the years clients have come from a broader cross section of clergy and most recently denominational judicatories have been increasingly encouraging candidates for ordination to take advantage of this service.

Although the career-development centers have the wider purpose of helping clergy in all aspects of developing their careers, they have inevitably been also a major resource for pastors in planning their continuing education. The close relationship of this movement to what we are here calling needs assessment is most dramatically illustrated in the work of Thomas E. Brown, now at the Center for Professional Development at Lancaster Theological Seminary. Brown drew heavily on his earlier pioneer experience at the Northeast Career Center as he developed one of the most widely used procedures for planned continuing education, the Survey of Resources for Development in Ministry Plan Book, adapting a number of components of one process to the other.

The Different Types of Needs Assessment Procedures

Most of the initial work in developing procedures for planned continuing education was done by individual continuing educators working independently. Only later did they become aware of each other's efforts. Then, in 1975, the Executive Board of the Society for the Advancement of Continuing Education for Ministry (SACEM) decided that it was time to take an overall look at what was being done in this area. A task force of that organization sent questionnaires to all SACEM members and to the seminaries belonging to the Association of Theological Schools. One hundred and thirty-four responses were received, 72 from seminaries, 44 from denominational offices, and 18 from independent centers or agencies. Of these, slightly less than half, 64, reported that they were currently offering such help. However, a number who said they were not now using any such procedure indicated that they expected to do so in the near future or described some informal process, usually involving personal interviews, which they were reluctant to designate as a "procedure" in terms of the purposes of that survey. With both those factors in mind, it is reasonable to say that somewhat better than half of the schools, centers and offices responding to the questionnaire are now doing something by way of needs assessment for the continuing education of the clergy. At the very least, it is now clear that those continuing educators who are now active in this area are no longer lonely pioneers.[3]

In view of the varied motivations which prompted some individuals to develop needs assessment procedures, it is not surprising that those procedures vary, their differences reflecting chiefly the purposes they are created to serve. It is possible to use these differing purposes to identify four principal types of needs assessment procedures now being used.

1. Market Research

Probably the simplest form of needs assessment is that done by continuing education programmers seeking information on the kinds and formats of programs which will attract students. This may be done by adding questions to evaluation instruments filled out by the participants in present programs, soliciting suggestions for future programs. It may also be done by questionnaires sent to all clergy in a particular area, so that there may be a wider base than just those who are currently participating in the programs of a particular school or center. An outstanding example of this type is the study of the continuing education needs of some 800 clergy in the Albany, NY area, done by Dr. Genevieve Burch for Christians United in Mission, an ecumenical organization of judicatories serving that part of New York State.[4] A number of seminaries have sought similar information by holding regional meetings of their alumni/ae. This provides an opportunity to combine learnings from individual respondents with that gained from group interviews.

What all of these have in common is that the information sought is for the benefit of those offering programs. Such needs assessment procedures are not designed to be of direct help to the clergy themselves as they strive for a deeper understanding of what their primary learning needs may be and as they develop their plans for their own professional development.

2. Performance Appraisal

A second form of needs assessment can be called performance appraisal. In this instance, the procedures are developed to enable congregational committees and/or denominational officials to work with pastors in defining a job description for the pastor of a particular church and then in appraising that pastor's performance in the light of that agreed-upon profile. When carefully done, such a process provides valuable information on the individual's strengths and weaknesses and can be helpful to that pastor in determining priorities for his/her personal and professional growth.

Denominational offices or regional judicatories have normally been the developers of these procedures, and the persons responsible for them see them as valuable tools for pastors in planning for their continued learning. That is certainly the case, and the procedures are apt to be especially useful insofar as lay persons of the congregation are involved with the process and the resulting plans are explicitly related to the particular ministry an individual is performing.

These procedures, however, raise the important question of who "owns" the process and its results. If the primary purpose is to help the employer in his supervision or placement of an employee, then the church rather than the pastor can be said to "own" the process. In that case, the pastors may be tempted to be less honest and open in the kind of information they bring to the process than they would be if the primary focus were on their self-development and the resulting plans belonged to them.

Loren Mead has pointed out that there are two complementary needs, the church's need for increased effectiveness in

its personnel policies, and the pastor's need for criteria and needs for self-development. Both are important and though they are plainly intimately related and each needs to inform the other, Mead argues that these needs are sufficiently distinct, and in some measure at odds with each other, to make it advisable to work at each independently. He writes, "A good bit of our difficulty has come from our confusion of two needs, our attempt to combine into one system two distinctly different needs that may not fit together."[5]

3. Procedures for Individualized Plans for Professional Development

This leads to the identification of a third type of needs-assessment procedure, a planning process in which the pastors individually are the sole or primary beneficiaries.

The two most widely used procedures of this type are the Survey for Development of Resources for Ministry Plan Book, of the Center for Professional Development of Lancaster Seminary, and the Guide for Continuing Growth of the Academy of Parish Clergy. Each is designed to be used with a trained counselor and consultation with peers and lay persons. A number of other procedures have similar purposes and components, but with significant variations in the amount of time required, the role of peers and lay persons as consultants, and the number and types of written instruments used. There are also a number of much simpler adaptations, usually self-administered procedures which the individual can complete in two to four hours.

In spite of the many differences, there are important similarities in the aims and assumptions of this type of procedure. For example:

(1) The procedures assume that it is desirable for clergy to be intentional in planning for their own professional development as well as in the other facets of their personal and professional lives.

(2) The procedures assume that competence in ministry requires personal maturity as well as the mastering of particular knowledge and skills. Ministry is as much an art as a profession. The continuing growth of the person in his/her own faith and life is an integral part of the minister's professional development.

(3) The procedures aim to assist clergy in taking responsibility for their own education. It is assumed that individuals' learning needs will differ depending on who they are, at what stage they may be in their careers, the particular communities and congregations they serve, and their varying interpretations of what Christian ministry in today's world requires of them. In some instances, it is important for ministers to become free of dependency patterns carried over from earlier schooling. Thus a common aim of most procedures of this type is to help individuals devise plans for their professional development which are tailored to their particular situation and which enable them to grow as self-learners and self-teachers.

4. Group Planning

Needs assessment is also done with groups of clergy who wish to develop plans for study they intend to do together. Such groups may be a small "colleague group" of clergy in a local community, the clergy of a regional judicatory, or a class in a seminary D.Min. program. In a number of situations lay persons as well as clergy are members of the group of colleagues in ministry who are planning to study together. In each case the task is to clarify the primary learning needs which the members of the group have in common.

With small groups this may be done by having each individual complete one of the simple self-administered instruments to identify personal objectives and then having the group discuss the results to discover what needs they share with the others.

In larger groups such as regional judicatories questionnaires completed by individuals may also be used. Anonymous responses are not as helpful as those in which persons who gather the information learn the names of individuals interested in particular subjects, in part because it is good to know whom to invite personally when a program is offered, and in part because some of the prospective students may well serve as a design group for the program planning.

A number of the seminary D.Min. programs require students to engage in one of the more extensive processes of individual self-assessment to aid in developing a study program which will best serve the learning needs of each student. In some, such as the Jesuit School of Theology at Berkeley, the members of a class serve as consultants to each other as they work their way through the individual programs and in the process develop a group plan for the class's study.

The Intention and Shape of this Study

As indicated above, the Executive Board of SACEM appointed in 1975 a Research Task Force to study the needs assessment procedures which had been developed independently of each other and which were becoming ever more widely used. The first phase of that study was the collection of information regarding how many processes there were, what were their basic characteristics, and how widely they were being used. That information was reported to the 1976 Annual Meeting of SACEM in Nashville and is available in the report of the Task Force, "Resources for Planned Continuing Education."

As it proceeded toward a more detailed study of these procedures the Task Force decided to focus its attention on procedures which had as their primary aim the development of individualized plans for professional development, the third type of needs assessment procedure described above. The intention was to examine those plans in which the individual was seen as the primary beneficiary (as distinct from the continuing education programmer or the ecclesiastical employer) and where the intended product was an individual plan for continuing education (as distinct from a more comprehensive plan for career development).

The Task Force then decided to study the selected procedures by interviewing a sample of about 100 persons who had used one

of them some months prior to the interviews, to learn what educational plans had been made, what components of the process seemed in retrospect to have been most helpful, what had prompted them to embark on the process, and what had helped or hindered their follow-through with the plans they had made.

The Task Force then designed a structure for the interviews, tested it with eighteen individuals, agreed on a revised interview instrument, and contracted with the Alban Institute to do the main body of the interviews and collate the information gathered from them. The Alban Institute staff proceeded in the Fall of 1977 to conduct structured telephone interviews with 91 persons, randomly selected, who had used one of the eight different procedures.

Because the titles of the plans studied are sometimes long and often sound much like each other, we have arbitrarily assigned our own designations to each and have used the designation whenever particular programs are referred to in this report.

The eight procedures in this report are:

A. The Academy Plan — The Guide for Continuing Growth
Academy of Parish Clergy
Attn: The Reverend Glen Peterman
General Delivery
Princeton, New Jersey 08540

Individuals follow a prescribed procedure with the help of a counselor and a number of peers and lay persons selected by the individual user. It took anywhere from two days to more than three months for those interviewed to complete the process.

B. The Notre Dame Plan — Needs Assessment Program
Center for Human Development
1100 Memorial Library
Notre Dame, Indiana 46556

A trained facilitator works with a small group of colleagues in a program using a variety of written instruments and group interaction and dialogue for personal self-assessment and planning. Those interviewed completed the initial phase in one to three days, but a follow-up phase is also part of the plan. All interviewees for this procedure were priests from the Roman Catholic Diocese of Richmond, Virginia.

C. The Lancaster Plan — The Survey of Resources for Development in Ministry
Center for Professional Development
561 College Avenue
Lancaster, Pennsylvania 17603

A trained facilitator guides a group of clergy or others, who may be colleagues or strangers to each other, in a structured process using written instruments and peer group interaction and feedback, and leading to the formation of individual plans for professional and personal development. The process normally requires three days.

D. The United Seminary Plan — An unnamed procedure designed by Donald B. Rogers
United Theological Seminary
1810 Harvard Boulevard
Dayton, Ohio 45406

This is a very individualized procedure in which the facilitator describes a range of options, instruments and process elements, and guides participants in developing their own process. It has been used primarily by seminarians before beginning their professional careers. The time involved varies from two days to three months.

E. The Lutheran Southern Seminary Plan
Proficiencies Objectives
Lutheran Theological Southern Seminary
4201 North Main Street
Columbia, South Carolina 29203

The procedure requires 1½ hours for data sharing followed by consultations with a counselor in a group setting. Using feedback from peers and laity, both in person and by instruments, the procedure emphasizes professional needs and skills development.

F. The UCC Plan — Parish Ministers Guide to Planning for Continuing Education
Office of Church Life and Leadership
United Church of Christ
Post Office Box 179
St. Louis, Missouri 63166

This is a self-administered procedure requiring two to four hours to complete and involving no consultation with counselor or others. The procedure is a condensation and adaptation of the S.R.D.Min. Plan Book (the Lancaster plan above).

G. The Garrett Plan — Professional Assessment Process
Garrett-Evangelical Theological Seminary
2121 Sheridan Road
Evanston, Illinois 60201

The process requires two to three months and involves consultations with counselor and with peers and lay persons, both in person and by written instruments. So far the primary users have been pastors beginning a D.Min. program.

H. The LCA Plan — Growth in Ministry - Model A Workshop
Division of Professional Leadership
Lutheran Church of America
2400 Queen Lane
Philadelphia, Pennsylvania 19129

Lutheran pastors and spouses participate in groups invited by their judicatory. Lay feedback is provided through written instruments. The process emphasizes group interaction and dialogue. Participants interviewed invested two to five days in the process.

The Task Force has studied the computer printouts of all of the responses to the interview questions which could be coded for computer analysis. This report is based on that statistical data as well as the comments made by the interviewees as they responded at greater length to particular questions. A summary of all of the statistical data and other information regarding the research methods used in the study are included in the appendix to the report, which is available as a separate supplementary document.

John Hendrickson

II. THE METHOD OF THE STUDY

SACEM's Task Force on Needs Assessment made the decision that the research population would be taken from lists supplied to it by the persons administering or distributing the assessment method. Consequently the Task Force wrote respondents from the previous study to seek lists of participants from the year targeted for the study, 1976. There was no effort to include proportionate numbers of women and non-white participants in the sample overall. In fact no women clergy turned up in the research sample, although four women religious did. One black clergyman appeared in the sample. Cross-studies were not attempted on such a small number. The number of interviewees from each assessment method was determined in proportion to the number of names submitted by the administrator of the system. No attempt was made to do on-site validation of the administrators' lists. A copy of the letter requesting names is to be found in the appendix.

A preliminary test of the telephone interview method was undertaken by Task Force members who reached a total of 18 interviewees. On the basis of those 18 interviews, the questionnaire, the interview instructions, and the interview supervision methods were adapted. The interview schedule is in the appendix, together with the instructions given to the interviewers and a list of the five interviewers (located in Washington, DC; Cleveland, Ohio; Boston, Mass.; Seattle, Washington; and Philadelphia, PA; and coming from Episcopal, Presbyterian, Catholic, and Unitarian backgrounds). Ninety-five interviewees were selected from the lists of the systems to be studied, with the selection method determined by the best method for ensuring random selection from the different sized lists (lists as small as 8 and as large as 240). The following table indicates how the 91 actually completed interviews break down in terms of the types of assessment methods and the ability to locate the interviewee.

Type	Interviews Needed	Interviews Complete	Interviews Incomplete			
			Not Located	Other*	Refused	Had material but did not use it
A (Fellows)	5	5	-	-	-	-
A (Members)	25	20	12	-	2	27
B	10	10	-	2	2	-
C	30	30	6	1	-	-
D	5	5	4	-	-	-
E	5	5	1	-	-	-
F	2	2	-	1	-	-
G	3	4	-	-	-	-
H	10	10	4	1	1	-
Totals	95	91	27	5	5	27

*These are cases where the person was located but could not be contacted to set up an appointment, or failed to be there when called for the interview.

It was at this point that it became clear that the method by which the assessment was administered was affecting our interviewing and potentially also it was affecting the usefulness of the assessment itself. We found that a large number of the persons listed as users of one method, the Academy Plan, actually had not used the method. In all plans our interviewers had difficulty locating the interviewees because of changes of address or inadequate address information from the administrator. The final sample of interviews included 91 completed interviews plus 18 in the test phase for a total of 109 persons who shared their experience of going through an assessment system. A total of 146 persons were actually contacted by telephone and made some response to the interviewers.

Each interview was written up in verbatim form by the interviewer. Dr. Joan Harris of the Department of Sociology at Howard University, who had advised on the form of the interview schedule, developed a coding manual from the early interviews and managed coding, keypunching, and computer runs to identify trends in the interviews.

Because the coding process necessarily eliminates some of the color and individuality of responses, all interviews were

also read and annotated by Celia A. Hahn, Alban Institute Associate for Publications and Program. Substantial assistance in collating the data, managing the interview process, and analyzing the computer print-outs was provided by Moira Mathiesen, one of the interviewers who is a writer, editor and researcher in private practice in Washington.

In a two day meeting of the SACEM Needs Assessment Task Force, the collated and organized data was explored by the Task Force members, who also re-read substantial amounts of the raw interview data. The members of the Task Force then identified learnings in the data for the final research report and determined and outlined the report contents. Mrs. Hahn managed the organization of the learnings and assisted the Task Force by writing up a draft of the learnings for this paper. That draft, as clarified and amended by the Task Force members became this paper.

Loren B. Mead

III. THE NEEDS ASSESSMENT PROCEDURES

A. How did participants get into the procedures?

1. What did they hope to get?

As the table below shows, the primary hopes people brought to the assessment processes were for personal and professional growth (40.7% of the total sample) and an assessment of themselves and their needs (20.9%). The ostensible purpose of the procedures, seeking direction for continuing education, rates a poor third (14.3%). These general figures seem to hold pretty well for the individual types, with the exception of the Notre Dame sample; 80% of the priests from the Richmond Diocese said they hoped for personal/professional growth.

Question 13: What did you hope to get out of it?	Total	A-F	A-M	B	C	D	E	F	G	H
Personal/professional growth	37 40.7%	2 40%	9 45%	8 80%	9 30%	2 40%	2 40%		1 25%	4 40%
Improved self-image, better self-evaluation	4 4.4%		2 10%			1 20%				1 10%
Better sense of community	4 4.4%		3 15%		1 3.3%					
Relevant/practical resources	4 4.4%		1 5%		1 3.3%		1 20%			1 10%
Direction for continuing education	13 14.3%	1 20%	2 10%		5 16.7%	1 20%	1 20%	1 50%	2 50%	
Assessment of self and needs	19 20.9%	2 40%	3 15%	1 10%	8 26.7%		1 20%	1 50%	1 25%	2 20%
None	7 7.7%				4 13.3%	1 20%				2 20%
Combination (excl. cont. ed)	2 2.2%			1 10%	1 3.3%					
No answer	1 1.1%				1 3.3%					

(All tables are coded as follows: A-F - The Academy Plan, Fellows; A-M - The Academy Plan, Members; B - The Notre Dame Plan; C - The Lancaster Plan; D - The United Seminary Plan; E - The Lutheran Southern Seminary Plan; F - The UCC Plan; G - The Garrett Plan; H - The LCA Plan).

Comments from the respondents give some of the flavor of these hopes. Some want "discipline,"A* another hopes for "a greater sense of community among priests, as well as a greater self-understanding."B Personal hopes for the LCA Plan participants, many of whom brought their wives to the assessment, included concerns for couples' communication and goal-setting. In their professional life, people hoped for better leadership skills and clearer goalsA. One wanted to be "able to handle parish frustration."A Some sought direction for the next stage of their ministry. A Garrett participant said, "I wanted the last 15 years of my ministry to be the best." A few wondered whether to continue in the pastoral ministry. There was some discussion among LCA Plan participants about whether the assessment process was an appropriate place to work on a career crisis.

Under the heading of "Assessment of Self and Needs," one respondent said he "wanted the opportunity to bounce myself off other people to learn how they saw me."A Another typical comment: "I was seeking self-understanding and personal confidence, and also hoped to discover where my competence might lie."E

The sample as a whole seems to be a group of go-getters, people who have some concerns and some hopes for themselves and for their ministry, people who are used to participating in continuing education events.

2. How did they find out about the process?

The primary source of information about needs assessment procedures was professional colleagues (30.8% of the total sample). Participants in the Notre Dame and LCA plans, where there was strong diocesan/judicatory encouragement to take part, were more likely to find out about the process through their denominations. As an Academy member put it, "The program was recommended by another minister when we were discussing my need for continuing growth." A significant number of Academy people got their information from newsletters, as well.

*For the convenience of readers who want to know what plan an interviewee participated in, quotations not otherwise identified are coded in the same way as the tables.

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 11: How did you find out about the assessment process?										
Professional colleagues	28 30.8%		9 45%		13 43.3%	2 40%	3 60%		1 25%	
Newsletters and publicity	15 16.5%	1 20%	8 40%	1 10%	3 10%			1 50%	1 25%	
Personal knowledge	10 11%		2 10%	2 20%	6 20%					
Denominational activities	20 22%	3 60%		7 70%	4 13.3%	1 20%	1 20%	1 50%		3 30%
Personal interest	6 6.6%	1 20%	1 5%		2 6.7%				2 50%	
Recommendation	3 3.3%				1 3.3%					2 20%
Invitation	5 5.5%									5 50%
Required	4 4.4%				1 3.3%	2 40%	1 20%			

3. How did they select the process?

A little over half the respondents said they had some knowledge of a process other than the one they selected. When asked "Why did you choose this one?" they responded:

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 15a:										
Unaware of choices	21 23.1%		3 15%	2 20%	9 30%	2 40%	1 20%			4 40%
Program in operation	3 3.3%	2 40%			1 3.3%					
Greater relevance	14 15.4%	1 20%	3 15%	2 20%	5 16.7%	1 20%	1 20%			1 10%
More useful in comparison	9 9.9%		5 25%		2 6.7%		1 20%			1 10%
Denomination/diocesan clergy group program	18 19.8%	1 20%	1 5%	5 50%	3 10%	1 20%		2 100%	4 100%	1 10%
Personal faith in program/ director	3 3.3%	1 20%			2 6.7%					
Availability	7 7.7%		1 5%		3 10%		1 20%			2 20%
Recommendation	3 3.3%				2 6.7%					1 10%
No answer	9 9.9%		6 30%		3 10%					
Not applicable	4 4.4%		1 5%	1 10%		1 20%	1 20%			

A substantial number of interviewees (23%) said that they did not know of other processes. Therefore, when their denominational executives, colleagues, or their own needs prompted them to join such a program, they selected the only one of which they were aware. During the interviews several respondents expressed interest in the other programs being evaluated.

Some Academy participants said they chose that process because it "focused on skills related to the parish," or because it was a method in which "both the minister and congregation would be the clients." Respondents in a process conducted by an institution offering a graduate program often linked the assessment with that program. A Lancaster participant said, "At first I thought that this was just a part of the applica-

tion process for the doctoral program, but even so I saw it as a valuable self-assessment tool."

For 56% of the respondents, this was their only experience of such a procedure.

4. How did they get into the process?

Respondents gave a variety of answers to this question, the most common being "I was interested" (26.4%). Sixty percent of the LCA plan participants indicated that the invitation from the judicatory executive had been the primary factor. United Seminary students' replies reflected their unique position as in-seminary participants:

> This course came at the end of my seminary training. It gave me something to think about and helped me to plan what I wanted to do in the future. As a matter of fact, the things that I wrote down as a result of the program as my goals for the future ... have not been the kind of things that I have done....
>
> I needed it, although at the time I didn't see any need; therefore I was turned off by the requirement. I'm glad now that I took it ... it was certainly not the waste of time I thought it was.
>
> Continuing education is really not a high priority for me at this time in my life.

Certainly another important factor in how people got into the processes had to do with the availability of time and money for continuing education.[6] Of the respondents, 87.9% said they had time off for continuing education, with a mean of 19.379 days, and 80.2% said they were provided with funds, generally from the congregation they served. The mean amount was $297.75 per year, with a range from $50 to more than $997.

31.9% said that the costs of the program were paid by the parish or from their own funds; 11% said that the procedure was free; while 29.7% reported that the cost was met by their judicatory, seminary, or religious community.

5. The influence of the diocesan/judicatory executive

Congregational support for continuing education was important; so was the backing of the Bishop, conference minister, or other executive. In the total sample, 72.5% of the executives were seen as favorable to the assessment procedure, and 50.5% paid for it, fully or in part. Strong judicatory support stood out particularly in the Notre Dame and LCA plans. Richmond priests said:

> The Diocese requires all its priests to have an individual growth plan if they don't want to have to leave and get a job with a trucking company.

> The Bishop ... took the assessment himself and has his own priest-counselor to assist him in following up on his development plan.

All priests in the Richmond Diocese, whether diocesan priests or members of religious orders, were strongly encouraged by the Bishop to take part in the program, and apparently a high percentage of them did so. Without this encouragement, several respondents said that they would probably not have participated.

The clergy who took part in the LCA plan received a special invitation from the Bishop which served as a strong impetus to enter the process. The comments of these participants were typical:

> The assistant Bishop ... really urged me to take advantage of the chance. He noted that not everyone had been recommended.

> The Bishop recruited me, otherwise I doubt that I would have sought out such a process at the time.

> I think that I would have done it even without the Bishop's encouragement because it met my own needs.

Eager to keep on growing as a human being and as a parish pastor, interested in knowing how he comes across and what he needs in order to grow, "the Rev. Joe Smith," our archetypical assessment procedure participant, takes himself off for the Center. No stranger to workshops and courses for clergy "on the grow," he leaves with the full backing and encouragement of his Bishop, and the support of his congregation, who provide him with 2½ weeks and three hundred dollars every year so that he can keep on improving his self-understanding and his ministerial skills and knowledge. As he nears the Center, he is aware of his hunger for affirmation and perhaps also of his uncertainty about getting it. A client of the Lutheran Southern Plan admitted:

> Before I went, because I am shy and was afraid others would criticize me, I was afraid and on guard. It's not easy to open your personal self up to others.

B. What happened during the assessment process?

1. How long did it take?

The most common response was "three days" (26.4% of the total sample). As the table below indicates, the mean time taken for the assessment by all respondents (17.608 days) was raised considerably by the responses from the Academy participants, whose mean time in the process was 74.889 days. Evidently, the main reason the Academy people took so long was that it was a self-administered program that lent itself to being squeezed in around at-home responsibilities. The loose time frame of the Academy program is also reflected in the twenty-

seven potential interviewees who reported that they had sent for the assessment materials but had not used them. Some of the Academy participants who reported that they were still in the process may have been speaking about Academy membership rather than participation in the assessment; there was a tendency on the part of many respondents to identify the process with the sponsoring institution. The assessment seemd to flow into an ongoing relationship with the Academy for the member who said, "I make a report to the Academy every year and they go over what I have been doing and evaluate it."

In general, it should be remembered that programs involving group activities at an away-from-home location tend to last for a shorter, more easily defined period than those that are self-administered.

Question 2: How long did the whole thing take?	Total	A-F	A-M	B	C	D	E	F	G	H
1 day	5 5.5%			2 20%		1 20%		2 100%		
2 days	15 16.5%	1 20%		5 50%	4 13.3%		1 20%		1 25%	3 30%
3 days	24 26.4%			3 30%	15 50%	1 20%			1 25%	4 40%
4 days	10 11%		1 5%		6 20%		1 20%			2 20%
5 days	5 5.5%				4 13.3%					1 10%
7 days	1 1.1%				1 3.3%					
30 days	2 2.2%	1 20%	1 5%							
56 days	1 1.1%	1 20%								
60 days	1 1.1%		1 5%							
90 days	4 4.4%	2 40%	1 5%			1 20%				
98 or more days	6 6.6%		5 25%				1 20%			
No answer	8 8.8%		4 20%			2 40%	2 40%			
Still in program	9 9.9%		7 35%						2 50%	

2. Who took part in the process?

The table below indicates the various group and individual settings for the assessment procedures, with most of the Academy members working alone, most of the Notre Dame Plan priests participating with colleagues they knew, the Lancaster groups tending to include more strangers than colleagues, and the LCA participants in mixed groups of colleagues and strangers.

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 18: Did others go through the process with you?										
Self only	15 16.5%	2 40%	11 55%					2 100%		
Group of strangers	21 23.1%	1 20%		1 10%	14 46.7%				4 100%	1 10%
Group of known colleagues	27 29.7%		3 15%	6 60%	11 36.7%	4 80%	3 60%			
Group of strangers and colleagues	22 24.2%		2 10%	3 30%	5 16.7%	1 20%	2 40%			9 90%
Group, congregation or peers	4 4.4%	1 20%	3 15%							
Self-developed participation	1 1.1%		1 5%							
Not applicable	1 1.1%	1 20%								

3. What parts of the process were seen as important? Respondents mentioned too many "key procedures" to code. Among the components singled out were:

> "the consultant, who is really the key to getting the program going"A (the primary importance of the consultant or leader was stressed constantly and will be referred to later in connection with participants' evaluation of the programs).
>
> the atmosphere --
>
> "the low-key manner (non-threatening) it was administered in"B
>
> "the high trust level"C
>
> beginning with strengths --
>
> "It helps you to see your own strengths and to build on these. At a later point you can do more with weaknesses."C
>
> written instruments, such as questionnaires
>
> peer feedback --
>
> "The genius of the program was that each person shared the main features of his life while the rest listened without interruption. Then they reacted, but in a non-judgmental way."E
>
> "Feedback from sisters who knew me ... who would call me if I was not coming clean."C
>
> lay feedback --
>
> "A positive factor was that the program provided them with a palatable manner of evaluating my ministry that they were able to handle. I had tried other methods of

evaluation before, but they had not succeeded."[H]

wives (in the LCA plan);

support groups --

"most important, the support groups which we formed locally"[B]

4. What were participants' key learnings?

Respondents hoped to get personal and professional growth and an assessment of themselves and their needs. These hopes seem pretty well matched by the primary learnings, most of which were coded as "self-awareness, self-direction" (41.8% of the total sample) or "greater awareness of self as minister" (25.3%).

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 25: What was your key learning?										
Identified leadership potential	4 4.4%		1 5%	1 10%			2 40%			
Need for more interaction among colleagues	6 6.6%		1 5%	2 20%	2 6.7%	1 20%				
Perspective of members of congregation toward ministry	5 5.5%	2 40%	2 10%						1 25%	
Better skills in classroom and communication	6 6.6%		2 10%	3 30%	1 3.3%					
Greater self-awareness, self-direction	38 41.8%		5 25%	3 30%	17 56.7%	3 60%	1 20%		2 50%	7 70%
Greater awareness of self as minister	23 25.3%	2 40%	5 25%	1 10%	8 26.7%	1 20%	2 40%	1 50%	1 25%	2 20%
Negative - lacks reality	2 2.2%	1 20%						1 50%		
None	2 2.2%		1 5%							1 10%
No answer	4 4.4%		2 10%		2 6.7%					
Not applicable	1 1.1%		1 5%							

The most commonly reiterated specific outcome mentioned by those who took part in the assessment procedures was self-affirmation. "The Lord can use even me," said one Richmond priest. "With my strengths and weaknesses, He can use me and help me to grow." A Lancaster participant's learning was "that I have had a lower opinion of myself than was justified by my strengths." For another, the assessment "made a significant improvement in my attitude in general -- up!" Some said they felt more confident, others were aware of being more able to risk, less threatened. One said, "The areas I was weak in, and thought I was alone, I found others felt weak also...."[C] When asked, "If I were planning to get into an assessment process, what advice would you give me?" one pastor advised:

Realize that you are not unique in your feelings of

> inadequacy and searching. Ministers do not have the same opportunities for image building that occur in industry, because they are liable to be isolated in their parishes and have an idealized picture of what other ministers may be doing.... I find that ministers tend to be a very threatened breed.[C]

Specific areas of affirmation were mentioned. One clergyman said: "It gave me positive affirmation and reassured me that I was right in wanting to remain in the pastoral ministry."[C] LCA Plan participants often mentioned affirmation of family life and new clarity about goals that needed setting in that area of life.

Many respondents also stressed <u>self-awareness</u> as a very important area of learning:

> If, deep in your heart, you really want to be a better minister, then you've got to find out what kind of a gum drop you are.[B]

> One of the things that I found out was that I am very decisive and have a strong ego, and I try now to be more aware of this.[C]

> One of the things which surfaced was my need to assert myself more.[C]

> I am discovering what kind of leader I am, and new insights are opening up.[E]

Several mentioned specific gifts they discovered they had:

> I had creativity/imagination. I really thought I had none![C]

> I am a highly gifted leader of prayer and worship.[A]

The affirmation and the confidence it engendered also made it possible to become aware of specific weaknesses:

> Some things surfaced as being low priorities with me -- youth work, for example. I am not good at this and have decided to leave this area to others in the parish. My congregation have accepted this idea.[H]

> I have now realized that there are certain things that I am not good at and have the ability now to say no to these tasks.[C]

Several respondents said that the assessment helped them to be more intentional, particularly about continuing education, and clearer about areas they need to pursue. One Academy member said:

I was most excited by realizing my need to keep on learning. I came out of the seminary with the feeling that I was already a complete minister, but now I know better.

C. What happened after the assessment?

1. Follow-up

a. In the process that you used, was there any kind of plan for follow-up?

Question 7:	Total	A-F	A-M	B	C	D	E	F	G	H
Yes	49 53.8%	4 80%	7 35%	10 100%	13 43.3%	3 60%	4 80%	2 100%	3 75%	3 30%
No	37 40.7%	1 20%	10 50%		15 50%	2 40%	1 20%		1 25%	7 70%
No answer	3 3.3%		1 5%		2 6.7%					
Not applicable	2 2.2%		2 10%							

Whether or not there was a plan for follow-up, respondents were convinced that follow-up was important, as the following comments indicate:

> That is one of the weaknesses of the program. Sometimes I am highly motivated, but other times I need the "law" -- something that will make me do what I should. There is no built-in check system from the Academy for this program.[A]

> The program depended entirely on me. It takes a lot of initiative and perseverance to follow through on a program when no one else is involved.[F]

> We set personal goals for continuing education work. Then we sort of agreed we'd meet again in about 6 months to check up on where we all were. We did not do this... in fact, nothing at all has happened by way of follow-up. I know I would have made better use of what I learned if this had happened. I was serious about it, but other things intrude and without the peer prodding which would have taken place, they simply usurped the time I was planning to give to continuing education.[H]

One respondent rather wistfully reached out to the evaluation interview as follow up:

> In some respects I was disappointed because there was no personal follow through, but the fact that we are having this interview and that the Church is involved in the survey means that someone must be interested in evaluating the program, and I think

that this is encouraging.[F]

b. If there was a plan for follow-up, what kind was it?

Question 7a: If so, what kind?	Total	A-F	A-M	B	C	D	E	F	G	H
Planned group	10 11%		1 5%	3 30%	4 13.3%		1 20%		1 25%	
Self-developed plan	22 24.2%	2 40%	5 25%	1 10%	3 10%	2 40%		2 100%	3 75%	4 40%
Planned executed	7 7.7%		1 5%	2 20%	2 6.7%		2 40%			
Planned - not executed	8 8.8%	2 40%	2 10%		1 3.3%	1 20%				2 20%
Planned by program - executed	6 6.6%			4 40%	2 6.7%					
Planned by program - not executed	1 1.1%	1 20%								
Planned - suggested	3 3.3%				3 10%					
No answer	3 3.3%		1 5%		1 3.3%		1 20%			
Not applicable	31 34.1%		10 50%		14 46.7%	2 40%	1 20%			4 40%

Those who participated in the Notre Dame plan, in which ongoing peer support groups are an integral feature, were clear about the importance of those groups in their life and work:

> The monthly checking in with my peer support group is very supportive and I find that I am now more self-directive.

> The diocese has a full-time priest who is coordinator of the program and who is continually planning and evaluating. He follows through on participants and also arranges support groups who meet on a monthly basis for mutual support, and to listen to each other.

The follow-up in the Richmond plan involves monthly overnight meetings away from the priests' own parishes, so that they have the time and freedom to come together as a group.

Those who subsequently entered a graduate program at the seminary which offered the assessment tended to see their graduate work as a natural follow-up to the assessment itself.

Most of the comments from those who went through other procedures indicated that, as the assessment drifts into the past, "things close in," as Walter Mitty said, and good intentions go by the board:

> I was supposed to check with another member of my group last spring to see how he was doing; he was also supposed to check with me. I had forgotten about this until you raised the question.[H]

> The "prodder" of our group is now out of the area

and has no contact.... I find that I need the stimulus of the group - much of the enthusiasm is lost when you get home to the daily routine.[C]

The pastors who took part made a covenant to continue meeting.... The group has not met since the summer....[E]

c. Who or what was helpful in following up?

The experience of the Notre Dame plan participants was echoed by the total sample; if anybody was helpful in following up the assessment, it was most likely to be one's colleagues.

Question 10: Have you found anything or anybody particularly helpful in following up on your continuing education plans since the assessment?	Total	A-F	A-M	B	C	D	E	F	G	H
Yes, colleagues	20 22%	1 20%	2 10%	4 40%	10 33.3%	2 40%			1 25%	
Yes, professionals	4 4.4%		3 15%		1 3.3%					
Yes, judicatory & denomination	13 14.3%		3 15%	5 50%	2 6.7%		1 20%			2 20%
Yes, family members	4 4.4%		1 5%		1 3.3%					2 20%
Yes, "faculty-type" people	6 6.6%	1 20%			4 13.3%				1 25%	
Yes, specific individuals	13 14.3%	2 40%	2 10%	1 10%	4 13.3%	1 20%	2 40%		1 25%	
Yes, congregation	2 2.2%		1 5%		1 3.3%					
No	21 23.1%	1 20%	6 30%		5 16.7%	2 40%	1 20%	1 50%		5 50%
No answer	5 5.5%		1 5%		2 6.7%		1 20%		1 25%	
Not applicable	3 3.3%		1 5%					1 50%		1 10%

Like the Richmond priests, a United Seminary Plan graduate found it helpful that "there are several pastors who get together to share and counsel each other."

Of the total sample, 23.1% had found no one who was helpful to them following the assessment.

When asked specifically about the helpfulness of their Bishop, judicatory executive, or denominational staff, respondents rated it at a mean of 6.91 on a scale of 1 (low) to 10 (high). A priest from the Diocese of Richmond singled out as especially supportive "the Spiritual Life Director, whom I call my Diocesan Daddy."

Asked to rate the helpfulness of their congregation's officers and board, interviewees' mean response was 7.22. While judicatory officials received very low or high scores more frequently, congregational leaders received higher average scores, indicating that the former were more often seen as supporting or obstructing, while the latter tended to be seen as amenable. As one pastor put it:

Not that the people haven't been cooperative or supportive; they have. It's that I have to take all the

> initiative with them... they'll go along with any continuing ed. plans I suggest within reason.[H]

Several of the Richmond priests said that their parishioners were really not aware of the program, sometimes because the priest had been in the parish only a short time. It is also possible that this program may have been more "priest centered," lacking elements that would require any participation from the laity.

Another source of support for the LCA Plan pastors was the wives who had participated in the assessment with them. One said:

> My wife and I.... programmed time for ourselves after the workshop for debriefing.... It was very useful. We would encourage this as a part of the program.

2. Behavior changes

A second general heading under which to examine "What happened after the process?" is the category of behavior changes. What did people do after the assessment that was different from what they did before?

a. Career changes

When we asked respondents whether there had been any career changes as a result of their participation in the assessment, 71.4% said "no." When asked about the nature of the career change, the most frequent response given (13.2%) was coded as "change in focus." It was clear that several people understood the career change question to refer to qualitative changes in the way they worked. One respondent, however, commented specifically that he moved to a parish that demanded more of his skills.[A]

b. Work changes

Most responded affirmatively when asked, "Are you aware of any changes in how you work?"

Question 9:	Total	A-F	A-M	B	C	D	E	F	G	H
Yes	70 76.9%	4 80%	12 60%	9 90%	25 83.3%	4 80%	4 80%	1 50%	3 75%	8 80%
No	13 14.3%	1 20%	3 15%		4 13.3%	1 20%	1 20%	1 50%		2 20%
No answer	6 6.6%		3 15%	1 10%	1 3.3%				1 25%	
Not applicable	2 2.2%		2 10%							

Typical comments describing these changes were:

> My self-concept was enhanced and I am more confident, and this has affected how I work with others.[G]

> I now have a couple people who I check out my ministry with and get accurate feedback.[A]

> I have blocked out my time more consistently. I engage in short and long range planning. I set goals for each day, defining tasks for morning, afternoon and evening.[C]

> I now monitor my method of operation to determine whether I am acting in an authoritative or collegial manner.[C]

When asked specifically about changes in how they worked with lay people, respondents emphasized the more sensitive, collaborative style of ministry they had adopted and the importance of lay feedback. 64.9% felt that there had been an improvement of one kind or another. A sister who participated in the Lancaster program said, "I do also notice a change when I am organizing retreats for the laity. I realize that I need to be aware of people as individuals, and that the 'win-lose' mentality has got to go." An Academy participant said, "I now delegate much more. The parish is now a cooperative venture, with less passive resistance from the congregation, and greater ownership by the lay leaders." A LCA Plan pastor used assessment data in parish planning: "The program helped me to identify my strengths by providing specific data, and I have been able to work with my council to exploit these strengths and to compensate for my weaknesses with lay people or other staff." A Notre Dame plan priest planned to use the procedure in his parish education program: "I have already talked with 30-40 people in my parish and every one of them saw value in it. Needs assessment can lead to better personal relations, better communication in marriages."

Of the 60.5% who felt they now worked better with other clergy, many respondents reported improved, more collegial relationships. This result was uppermost in the minds of several Notre Dame Plan users, one of whom said:

> If I had been younger, this program would have completely altered my life. I never cared about other priests before, but I do now....I also hope to be able to help young pastors who are scattered in remote parishes on their own, by taking over their duties to permit them to go away and study.

Another interviewee reported:

> I have a more collegial relationship with other ministers as a result of the Lancaster Seminar. I feel more confortable sharing with them my strengths and weaknesses.

Another Lancaster graduate said:

> It is also helpful in the community, because so many of the sisters had taken the program that now we have a common language and understand what we have experienced.

c. Changes in care of self and family

While the interview schedule did not address these areas specifically, some respondents volunteered that they were following through on insights about the need to pay more attention to their marriages or take better care of themselves. A Notre Dame plan priest said:

> I have gone to a doctor for a full evaluation. I have also joined a rigorous "YMCA" program for physical fitness. This need arose out of my assessment.

Predictably, it was a LCA Plan pastor who said:

> The process of looking ahead ... has become an ongoing model within my family. We have translated it in various ways to meet our needs and it has been very, very helpful.

d. Becoming leaders of assessment processes

For some participants, a primary motivation may have been acquiring the skills to become an assessment facilitator. When asked, "Have you ever been a leader, facilitator or organizer of an assessment yourself?" 19.8% of the respondents replied "Yes," and 3.3% responded with a qualified affirmative answer.

e. Changes in planning continuing education

While the foregoing personal and professional changes were important to the participants, we were most concerned, of course, to find out whether people planned their continuing education differently as a result of the assessment processes. When asked directly, "Do you now plan your continuing education differently because of the assessment?" respondents said:

Question 6:	Total	A-F	A-M	B	C	D	E	F	G	H
Yes	67 73.6%	4 80%	13 65%	8 80%	23 76.7%	4 80%	4 80%	2 100%	4 100%	5 50%
No	19 20.9%	1 20%	4 20%	1 10%	6 20%	1 20%	1 20%			5 50%
No answer	4 4.4%		2 10%	1 10%	1 3.3%					
Not applicable	1 1.1%		1 5%							

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 6a: If yes, can you say how? In what ways?										
Better organization of plans	23 25.3%	1 20%	5 25%	1 10%	9 30%	3 60%			3 75%	1 10%
Areas of weakness and strength	19 20.9%	3 60%	4 20%	4 40%	4 13.3%	1 20%	2 40%		1 25%	
Benefits to congregation	3 3.3%						1 20%			2 20%
Increase in nonacademic areas	2 2.2%			1 10%	1 3.3%					
Increase in specific academic areas	3 3.3%			1 10%				2 100%		
Greater self responsibility	2 2.2%		1 5%		1 3.3%					
Different emphasis in work	4 4.4%				2 6.7%					2 20%
Combinations, stressing personal development and organization	9 9.9%		2 10%	1 10%	6 20%					
No answer	7 7.7%		4 20%	1 10%	1 3.3%		1 20%			
Not applicable	19 20.9%	1 20%	4 20%	1 10%	6 20%	1 20%	1 20%			5 50%

Many said specifically that their plans were better organized, "more directed, less helter-skelter"[A]:

> I plan it. I no longer leave my continuing education program to chance, nor am I procrastinating about it.[C]

> I no longer just go to things because they interest me; now I also try to see how they would benefit the people in my congregation.[E]

The more intentional approach to continuing education was guided by the awareness of strengths and weaknesses derived from the assessment:

> I feel I have been confirmed in areas I have worked in and feel more confident. I have the confidence also now to work on areas of need indicated by the assessment.[C]

> I try to look at areas where I am weak and that can strengthen and challenge me. Before the assessment I would have probably taken what I liked.[D]

> The evaluation by my congregation affirmed certain areas and there are other areas where I am now avoiding further education, because the congregation feels that I have all that I need there.[H]

> The program helped me to understand that I needed help in the area of management.... I have also taken workshops in personal growth and personal spiritual growth, which are areas that I had tended to ignore before the program.[A]

Another measure of perceived behavior change emerges from a comparison of the following tables:

Question 3: Prior to that, had you engaged in any continuing education activities?	Total	A-F	A-M	B	C	D	E	F	G	H
Yes, 1 to 3	38 41.8%	4 80%	8 40%	3 30%	13 43.3%		2 40%	1 50%	1 25%	6 60%
Yes, 4 to 6	11 12.1%		3 15%		3 10%		2 40%		2 50%	1 10%
Yes, 7 or more	12 13.2%		5 25%	1 10%	3 10%				1 25%	2 20%
Yes	19 20.9%	1 20%	2 10%	6 60%	8 26.7%			1 50%		1 10%
No	10 11%		2 10%		2 6.7%	5 100%	1 20%			
No answer	1 1.1%				1 3.3%					

Question 3a: If so, what kind or types?	Total	A-F	A-M	B	C	D	E	F	G	H
Graduate training	11 12.1%	3 60%	1 5%	1 10%	6 20%					
Workshops on specific subjects	30 33%	2 40%	4 20%	7 70%	12 40%		2 40%	1 50%		2 20%
Courses	5 5.5%				3 10%				1 25%	1 10%
Multiple types	30 33%		10 50%	1 10%	6 20%		2 40%	1 50%	3 75%	7 70%
Other	2 2.2%		2 10%							
No answer	2 2.2%			1 10%	1 3.3%					
Not applicable	11 12.1%		3 15%		2 6.7%	5 100%	1 20%			

Question 4: Have you undertaken any continuing education as a result of the assessment?	Total	A-F	A-M	B	C	D	E	F	G	H
Yes	60 65.9%	4 80%	13 65%	8 80%	19 63.3%	3 60%	3 60%	1 50%	4 100%	5 50%
No	27 29.7%	1 20%	3 15%	20%	11 36.7%	2 40%	2 40%	1 50%		5 50%
No answer	1 1.1%		1 5%							
Not applicable	3 3.3%		3 15%							

Question 4a: If yes, what kind or types?	Total	A-F	A-M	B	C	D	E	F	G	H
Graduate training	17 18.7%	3 60%	3 15%		6 20%				4 100%	1 10%
Workshops on specific subjects	23 25.3%		5 25%	5 50%	6 20%	2 40%	3 60%			2 20%
Courses	5 5.5%	1 20%	2 10%	1 10%		1 20%				
Psychotherapy (personal insights and needs)	2 2.2%			1 10%	1 3.3%					
Multiple types	4 4.4%		1 5%		2 6.7%			1 50%		
Other	11 12.1%	1 20%	3 15%		5 16.7%					2 20%
No anser	1 1.1%			1 10%						
Not applicable	28 30.8%		6 30%	2 20%	10 33.3%	2 40%	2 40%	1 50%		5 50%

Question 5: Do you currently have any future plans for continuing education based on that assessment?	Total	A-F	A-M	B	C	D	E	F	G	H
Yes	61 67%	3 60%	14 70%	9 90%	18 60%	4 80%	2 40%	2 100%	3 75%	6 60%
No	30 33%	2 40%	6 30%	1 10%	12 40%	1 20%	3 60%		1 25%	4 40%

Question 5a: If yes, what kind or types?	Total	A-F	A-M	B	C	D	E	F	G	H
Graduate training	18 19.8%	2 40%	4 20%		9 30%				2 50%	1 10%
Workshops on specific subjects	16 17.6%	1 20%	4 20%	6 60%	1 3.3%	1 20%				3 30%
Courses	10 11%		2 10%	2 20%	3 10%	2 40%	1 20%			
Psychotherapy	3 3.3%			1 10%	2 6.7%					
Travel (sabbatical)	3 3.3%		2 10%		1 3.3%					
Multiple types	3 3.3%					1 20%	1 20%	1 50%		
Other	8 8.8%		2 10%		2 6.7%			1 50%	1 25%	2 20%
Not applicable	30 33%	2 40%	6 30%	1 10%	12 40%	1 20%	3 60%		1 25%	4 40%

While respondents, in general, have been, are, and intend to be eager consumers of continuing education, there is a shift in the kind of educational program chosen since the assessment. The pattern that reappears, with variations, through the interviews is a decrease in the selection of "multiple" kinds of educational activities, a decrease in "workshops," and an increase in graduate training or other "courses." This feels like a shift away from participating in whatever comes along, toward a more planned and focussed approach to continuing education.

D. How did participants evaluate the assessment?

1. General evaluation

When asked, "How do you feel about having taken this assessment?" 59.3% of the interviewees replied that they had positive feelings about it, and 26.4% specified ways it had been helpful, as the following table spells out:

Question 21:	Total	A-F	A-M	B	C	D	E	F	G	H
No answer	1 1.1%		1 5%							
Would repeat to see growth over time	3 3.3%		2 10%		1 3.3%					
Helpful in skill development	4 4.4%	1 20%	2 10%		1 3.3%					
Helpful in personal growth	15 16.5%		1 5%	3 30%	7 23.3%	1 20%	1 20%		1 25%	1 10%
Increased focus and interest	3 3.3%		2 10%					1 50%		
Positive feelings	54 59.3%	4 80%	10 50%	7 70%	18 60%	2 40%	3 60%		3 75%	7 70%
Positive feelings, tempered by lack of follow-through	6 6.6%		1 5%		1 3.3%	1 20%	1 20%	1 50%		1 10%
Helpful in religious community	2 2.2%		1 50%		1 3.3%					
Basically negative	3 3.3%				1 3.3%	1 20%				1 10%

Typical respondents went on to say:

> It was extremely hard work, but I had a real sense of accomplishment. I really enjoyed it.[A]

> It certainly helped me to re-evaluate. So often you can go into the role of minister without having a chance to stop and look at what you are doing.[C]

> I feel extremely good about it. It probably made the difference for me between a growing sense of competence and a state of drifting or, more probably, a complete change of profession.[A]

Next to a general positive reaction, the most common comment was that the assessment had been "helpful in personal growth." Note Dame plan respondents looked back at the assessment not only as individuals, but also as participants in the Diocese that sponsored it. One said, "It wasn't a cure-all but it gave the Diocese a lift." Others noted the element of risk:

> The program leads men to be more self-possessed. Its results can be either positive or negative and there is no way that this can be programmed in advance. This means that there is a big element of risk for the Diocese, but both the Bishop and the Diocese have been willing to take this risk, which in itself is a very positive thing -- that they do not feel

threatened by the idea of growth on the part of the priests.

Other questions elicited a positive general evaluation of the assessment. When asked, "As an overall experience, how would you rate it on the 1-10 scale?" the mean rating was 9.073. Interviewees were also asked whether they had recommended the process to others; 69.2% replied that they had recommended it, though many were unsure whether their suggestion had had any effect. Asked to rate how the assessment had met their hopes, the mean response was 7.915, on a scale of 1 (low) to 10 (high). An Academy graduate summed it up: "I think it achieved more than I could have hoped for. It is hard work, but it is a superb program."

2. Evaluation of specific aspects

Interviewees were asked to rate the use of these specific parts of the process on a score of 1 to 10. The following tables give the mean response for the total sample and for each group.

a. Facilitator or leader

Total	A	B	C	D	E	F	G	H
8.452	8.133	8.4	8.9	7.4	8.6	NA-100%	7.75	7.85

It is interesting to notice how many of the comments about leaders also deal with participants' anxiety and the need for climate setting.[7]

> The professor... led us up to this look at ourselves, so that by the time we got to the assessment it was less of a threat.[D]

> I am concerned about the instructions given to the participant. They tell him to talk with a consultant and this can seem very threatening. Maybe the instructions could be worded in such a way that they will make people see why this is important and encourage them to do it.[A]

> It was operated by a priest. I felt some discomfort at the idea of opening up to a layperson.[B]

> The trouble seems to be that those who are isolated and fearful see the program as a threat. I think that this is why the use of a consultant in the process is so important.[A]

As previously mentioned, a number of respondents stressed the importance of the leader in ensuring the program's success.

b. Special instruments, tests, or written designs

Total	A	B	C	D	E	F	G	H
7.665	6.75	8.5	8.017	6.75	7.5	7.5	8	7.5

Specific comments about particular instruments included the following:

> I would rate the LIFO test at 10 -- this is an excellent questionnaire.[E]
>
> The design of the questionnaire needs attention, as some of the areas included do not relate to parish work.[A]
>
> I thought that there was a weakness in the knowledge inventory, which was too general; this has now been changed and is, if anything, too specific.[C]
>
> The least useful (and what we spent most of the time on) was the first part of the process where we drew pictures and talked about these.[H]

Many respondents volunteered that they thought it was essential to "do your homework" before the assessment.

c. Use of group settings or working groups

Total	A	B	C	D	E	F	G	H
8.058	8	8.4	8.233	6.9	7.8	NA 100%	7.5	8.45

LCA Plan participants were enthusiastic, generally, about having their wives included in the assessment, but they were negative about the use of separate work groups for pastors and wives. One said the wives felt "left out," and another commented that "since my spouse was invited to go with me, I did hope we would develop some good communication skills. They split us up, so I was very irritated about this."

The Notre Dame Plan participants spoke warmly of their ongoing clergy support groups, on the whole:

> They're beautiful people. I feel much more personal support.
>
> All but one of them are very faithful and some of them I can relate to and go to with my personal problems.

d. Use of peer feedback

Total	A	B	C	D	E	F	G	H
7.899	7.361	8.1	8.350	6.5	7.1	NA 100%	8.25	8.556

An Academy participant commented:

> There should be a different questionnaire for the clergy evaluators, because unless you are working together in team ministry they do not know much about your regular day to day activities.

e. Use of lay feedback

Total	A	B	C	D	E	F	G	H
7.946	8	NA 60%	NA 87.6%	NA 60%	NA 60%	NA 100%	7.667	8.111

Some respondents who did not have lay feedback commented that it would have been helpful. Most of those whose programs did include feedback from laity found value in it:

> It has helped by providing me with a perspective from the members of the congregation as to how they see my ministry.

> Evaluation of the participants by approximately 50 members of their congregations... also served to reveal their interests, which helped in providing a team approach.[G]

> It was very helpful in the feeling it evoked from the lay evaluators -- it really hooked the congregation in and this has continued.... I also think that there should be a more detailed spelling out of the role of the lay evaluators.[A]

At least one clergyman confessed his uncertainty, however:

> I still have a few misgivings about having the lay people fill out the rating forms.[H]

Another interviewee commented on the fact that there are aspects of the minister's life that parishioners are not familiar with and so cannot evaluate.

f. Time frame

A sixth aspect of the process was the time frame -- a subject on which interviewees volunteered comments. A number of LCA Plan respondents felt it was "telescoped" and "exhausting":

> The leaders kept the program on the run, to keep on schedule, but we wanted to walk.

A Garrett participant also had some feelings about the schedule:

> I felt pushed. We finished with an assignment and were to be back at 8 a.m. with assignment completed. The next morning we were told that it was only to

see if we would do the assignment. I did not do the assignment. Guess they read something into that. (The interviewer commented, "The anger is still there on the above.")

Some members of the in-seminary plan at United Seminary also commented that the program was too brief to have a great deal of impact:

> It was too short a program to provide much real understanding. At that time it was set up to provide us with goals for our first year in ministry, and I did not realize at the time how much there is to learn.[D]

3. Use of learnings

When asked, "How well do you feel you have used what you learned in the assessment process?" responses were coded as follows:

Question 24:	Total	A-F	A-M	B	C	D	E	F	G	H
Improved self-image for leadership	6 6.6%	1 20%		1 10%	2 6.7%	1 20%				1 10%
Positive but vague	34 37.4%		4 20%	6 60%	13 43.3%	1 20%	3 60%		3 75%	4 40%
Daily relationships with congregation	5 5.5%	1 20%	2 10%						1 25%	1 10%
Moderate, will pick up plans	17 18.7%		4 20%	1 10%	9 30%	1 20%	1 20%			1 10%
Strengthening of colleague relationships	2 2.2%	1 20%		1 10%						
Self development	14 15.4%	1 20%	4 20%		6 20%		1 20%	1 50%		1 10%
Not using results	9 9.9%	1 20%	2 10%	1 10%		2 40%		1 50%		2 20%
No answer	2 2.2%		2 10%							
Not applicable	2 2.2%		2 10%							

Some of the comments underlined the positive responses:

> It has become a definite part of my life and ministry.[A]

> I have been able to use a lot of the revealing and insightful comments from my support group. Many priests have a poor self-image and there is a lot of room for growth if they are to become leaders.[B]

Other comments spell out the felt need for more follow-up indicated in the table:

> What I have done has meant much. However, there is more to do and I have been a bit lackadaisical about this. There has been no peer group to prod me.[C]

> Not as well as I'd like to have. For example, one of the pastors and I wanted to work on Biblical interpre-

> tation, and we decided to write some commentaries on books of the Bible together. The press of work just kept us from doing it.[C]

There was an underlying suggestion of guilt in some of the responses, suggesting that the interviewees felt that they had not made as much use as they should of the learnings gained from the program.

IV. LEARNINGS FROM THE STUDY

A. Who takes part in assessment procedures?

The 91 people who were interviewed for this study may have been a typical group of assessment participants. Eighty-seven of them were men; the four women were sisters who took part in the Lancaster plan assessment. Ninety were white, one was black. Seventy were married. They came from twenty-five states and had attended a wide variety of seminaries. Their ages ranged all the way from 25 to 74, with no observable clumping around mid-career or any other stage. Seventy were senior minister of their church, and their mean time in that position was 4.824 years. Parish budgets came in all sizes, with a high of $400,000. As indicated earlier, they had diocesan/judicatory and congregational support for their continuing education, with time and money to make it possible.

These statistics contrast with those reported for clergy generally. "Of the total U.S.A. clergy, 32% received some time and/or money... to participate in continuing education programs. 18% of all clergy received both time and money while 5% received money but not time and 9% received time but not money."*

This is a privileged group of people who are in the habit of going after training and growing experiences. There are probably a few people who are so clear and intentional about their educational plans that they don't need or use assessment processes; there are undoubtedly a lot more who are so depressed or unmotivated that they rarely sign up for any continuing education events. Our sample represents the group in the middle -- eager, but not sharply focussed. In fact, their hopes and expectations often seem global and diffuse. They are looking for personal and professional growth in general. How do they come across? What are their gifts? They are hungry for self knowledge and self affirmation, which they receive as grace.

B. The effect of diocesan/judicatory support

There were a few interviewees who might not have participated in the assessment without the invitation, encouragement, support and/or pressure of the church executive, and for whom this may not have been prime time for an assessment process. The Notre Dame Plan participants in particular were under considerable pressure to participate, although none of those interviewed appeared to resent this. In fact, the encouragement

*From "Continuing Education Participants: Who, How Many, Types of Program, Attitudes," a SACEM study by Dr. Robert L. Bonn, 1975.

and support of the Bishop or other official was perceived as important and helpful by most who received it.[8] Except for highly motivated self-starters, the support was crucial. For the self-starters, it seemed to deepen their sense of belonging and satisfaction. "Being picked" by the executive begins the process of affirmation and carries weight. The kind of inclusive support seen in the Notre Dame process seems to maximize the effects of the assessment.

Congregational support has also been important for participants. It may be important to encourage a less passive, more informed kind of support from laity that includes larger elements of partnership and accountability.

C. The time frame

It seems to be very hard for people to create the disciplined structure for an assessment all alone, amid the pressures and distractions of parish and family life, though some succeeded in doing so. One commented: "I would say that the use of a booklet like this is very helpful, but that there would be greater value in working through it with another person or in a group rather than doing it alone."[F] Participants are helped by an away-from-home space of time in which they can devote themselves wholeheartedly to the work of the assessment. Since deeper self-awareness informed by honest feedback is important, there needs to be time for the right climate to develop. During a period of at least three days, there can be time to build trust, give psychological space, "sleep on" insights. Participants object strongly to being pushed by too little time or too tight scheduling.

While there was a very small sample of seminary students who took an assessment procedure as part of their curriculum, the indications are that the effect, satisfaction, impact and use of learning are less under those circumstances.

D. The role of the leader

The leader or facilitator is important in setting the climate and providing the structure for the work. His or her reputation may be an important factor in people's decision to take part in the assessment. People seem to want direction from another while using the stuff of their own experience. The leader sets the tone for trust building, for accepting where people are with their limitations and areas of expertise -- and for requiring acceptance from the other participants. An effective facilitator demonstrates warmth and concern for participants, is enthusiastic and knowledgeable as a resource person. He/she has a clear understanding of both content and process.

E. Composition of the working group

The character of the group needs to be supportive and non-threatening. Perhaps the most useful composition is a mix of colleagues and strangers, who provide the known and the unknown, the comfort of familiar people and the challenge of new folk who are also professionals in ministry.

While the response to including wives was positive, their

presence tended to change the focus of the work away from professional life toward family concerns.

F. The use of feedback

The key experience of the assessment process seems to be dialogue about work and self with others -- a dialogue whose effect is both purgative and affirming. Feedback, the contribution of others to that dialogue, is anxiety-producing in anticipation, but surprisingly affirmative in actual experience. Even negative feedback is affirming when it gives permission to have some inadequacies.

Most respondents experienced peer feedback as part of the assessment process, and they regarded it as essential. In addition to the specific content, the fact of dialogue with other professionals was important because it spoke to the isolation many participants came from.

For those who did experience lay feedback as part of the assessment, it seemed no less essential. For many clergy it was a new experience to know what lay people think and feel about them. For some, feedback from laity was the beginning of a pattern that continued as an important part of parish life.

G. Use of designs, instruments, printed forms

Forms are important for advance preparation and seem to help people to organize their experience, concerns, needs and questions about professional and personal growth and development. Some kinds of projective devices are probably useful, not so much for the analysis they provide but because talking about what has been projected is important. Working on the instruments with a resource person and discussing them with peers seems to engage people, free them, make learnings both affective and effective. Like the "diplomas" of the Wizard of Oz, the forms add an aura of credibility to participants' learning. The specific information fades in time, but people remember the instruments as helpful.

H. Follow-up

Participants are aware of the pressures and demands which make them waiver in carrying out their chosen plans. They are clear about the need for specific methods for following up the process -- for completion, for integration of learnings with their life and ministry, for discipline, out of a need to have interest showed in them -- interest that says "you're worth it." The longed-for follow-through seems inevitably to get short-changed without strong diocesan/judicatory input. Colleague groups were the most highly evaluated kind of ongoing support. Indications are clear that assessment procedures need follow-up methods firmly built-in to the process and budgeted for in the beginning -- not "sort of agreed."

I. The medium and the message

At every step, the procedures and the analysis of them are influenced by filters that affect decisions, programs and interpretation. Would-be participants read the brochures about the

programs through the filter of their own needs and dreams, which may have determined what they got out of the processes. The procedures are heavily influenced by the leaders' approaches and by the character and program of the institution that sponsors them. Where spouses were part of the assessment procedure, participants tended to focus on and make commitments about family issues. Where the assessment procedure took place in an educational institution, there was a tendency to see it as entry into a degree program. Where small group methods were used, participants discovered the kinds of affirmation found in small personal groups in human relations training. It was our hunch that much more was going on than our processes could uncover, and we were aware that we influenced the results of the study by the questions we decided to ask. So many things seemed to shape the results to such an extent that we found new meaning in McLuhan's statement that "the medium is the message." There are complexities here for participants, researchers and producers to ponder.

For the latter, two important questions may be:

To what extent are the methods of the assessment consistent with its objectives?

To what extent does the process push participants in the direction of the institution rather than in the direction of their own development?

Another imponderable: to what extent is society's current predilection for intentionality a force on these clergy? In the culture in general, in the ministry as a profession, in schools and professional journals, value is placed on paying attention to one's career. Is it important to these assessment-takers to say, "Now I'm paying attention to my career; I'm playing the game?"

J. What do assessments accomplish?

The study indicates that the procedures do increase the participants' level of intentionality and focus in continuing education, especially when the assessment processes have the characteristics of what Jim Gunn called "the ideal process" -- i.e., when people participate with judicatory support and money behind them, when the working group includes a mixture of strangers and colleagues, when the process lasts three days and includes the following components: a facilitator, printed instruments, peer feedback, a way to build in lay feedback, and a follow-up method that works. Procedures that include those elements do help participants arrive at new clarity about their needs for continuing education and engage in more focussed planning to obtain it.

But more important than these gains, for those who took part in the assessments, was a "by-product" -- at least in relationship to the procedures' stated purpose. The result that mattered most to the participants was the affirmation they received from the process, the message that "you are okay; you have some important gifts; there are some things you're not so good at, and that's okay, too." The strong response of the participants to this hoped for and yet unanticipated gift led us to the hunch that the population with which we were dealing

did, indeed, have difficulty finding affirmation elsewhere. We wondered, for example, about how this strong need for affirmation colored what they read in the brochures about the needs assessment procedures. We wondered what it meant about their level of comfort with their role in religious organizations. If this sample represented the go-getters, the cream of the crop, we wondered what this said about the presumably vast numbers of clergy and other religious leaders who do not go out on a limb with their hopes, who do not try to keep on learning, who do not plan for their future.

Those gloomy speculations reach beyond the scope of this study, though they are important to consider. For "the Rev. Joe Smith," life and ministry look a bit brighter after the assessment process. Not only has he been helped to take more responsibility for his own learning, he has received a life-enhancing experience. A time for dialogue about work with self and others has been an important intervention in his life. Having a chance to see himself as others see him has helped him feel more confident, less threatened, more able to risk. He sees his relationship with peers and congregation as a more collegial one, and he is less nervous about the threat inherent in feedback and more hopeful about the promise it holds for continuing growth in ministry. The experience has met his hopes -- and more.

Celia Allison Hahn

FOOTNOTES

1. For a history of clergy continuing education see the articles by Robert T. Frerichs and Connolly C. Gamble in The Drew Gateway, Vol. 47, No. 1 (1976-77).

2. For further information including names and addresses of the centers, write the Career Development Council, 475 Riverside Drive, Room 770, New York, NY 10027.

3. The information reported here is from "Resources for Planned Continuing Education," a survey prepared by a special Task Force of SACEM to study needs-assessment procedures. June 1976.

4. "Continuing Professional Education Interests of Clergy," Report of a Survey of Clergy of the Albany, NY Area, by Genevieve Burch (1974). Available from Hartford Seminary Foundation. Dr. Jackson Carroll followed this up with a complementary survey of clergy in the Hartford, CT area.

5. "Clergy Evaluation: Who Owns It?" by Loren B. Mead. An Alban Institute publication. 1974. Now out of print but replaced by "Evaluation: of, by, for, and to the Clergy," Alban Institute, 1977.

6. The study by Robert Bonn indicates also that time and money are factors influencing program participation. However, there was an unexpected lack of relationship between time/money resources designated by congregations and rates of planned program participation. Many clergy use their own time and money to support their continuing education. See R. L. Bonn, "Continuing Education Participants: Who, How Many, Types of Programs, Attitudes." Available from SACEM.

7. The critical role of the facilitator in climate setting is clearly indicated in the work of adult educators. See Adult Learning, by Irving Zorge, et al. Washington, DC: Adult Education Association, 1965. Also The Modern Practice of Adult Education: Andragogy vs. Pedagogy, by Malcolm S. Knowles. NYC: Friendship Press, 1970.

8. The Bonn study quoted earlier clearly indicates how important denominational support and affirmation are in influencing clergy participation in continuing education.

APPENDICES

PLANNED CONTINUING EDUCATION:

A Study of Needs Assessment Processes

Appendix A: Letter requesting names of interviewees
Appendix B: List of interviewers
Appendix C: Interview instructions
Appendix D: Interview Schedule
Appendix E: Tables not included in text

SACEM

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Appendix A

AUBURN THEOLOGICAL SEMINARY
in association with Union Theological Seminary
3041 Broadway (at 120th St.) New York, N. Y. 10027

December 14, 1976

Dear

A year ago you responded to a questionnaire I sent you on behalf of a Task Force of SACEM to study some of the resources used to aid pastors in planning their continuing education.

From those responses we prepared a report describing a number of procedures which used a set of relatively formal instruments and techniques. That report was available at the June meeting of SACEM and if you do not have a copy, and wish one, I will be happy to send it along.

Our next step in the study is to follow up with interviews of a small sampling of individuals who have used one of those procedures. But at the same time, we also want to be interviewing a number of persons who have done their planning with more varied, informal procedures or interviews.

In order to have this second list of names, from which we will select a small sample for interviews, I write now to ask you to send me a list of the names and addresses of all the individuals who have worked with you during the calendar year 1976 in planning their continuing education.

Our Task Force believes that our study will be far richer if we are able to include persons who have done their planning with a variety of different kinds of help. One idea which we would hope to check out in this way is that the particular instrumentation used may not be as important as that the person took the time for planning and turned to some outside resource as a guide for that planning.

When you send the list, I would also appreciate having from you a letter briefly summarizing the kind or kinds of help you offered, and any other personal observations you may have regarding trends you see in the desire or need of clergy for the kind of help for planned continuing education you provide.

Telephone: Area code 212/662-4315

December 14, 1976

We expect that the results of our study will be valuable both to those who are providing and to those who are using any of these resources, and we intend to share our findings at one or more consultations in 1978. But at this point our endeavor needs your help. I hope we may have your continued cooperation and that I may be hearing from you soon.

Sincerely yours,

John H. Hendrickson, Chairperson
SACEM Task Force for Study of Resources
for Planned Continuing Education

(Please send your letter and list to me at the above address.)

JHH/fl

Appendix B

SACEM Research Interviewers

The Rev. Hugh R. Brownlee
14985 Chardon-Windsor Road
Chardon, Ohio 44024

Ms. Moira B. Mathieson
925 25th Street, NW
Washington, DC 20037

The Rev. David C. Pohl
Unitarian Universalist Association
25 Beacon Street
Boston, Massachusetts 02108

The Rev. Gilbert Ward
Presbytery of Philadelphia
2200 Locust Street
Philadelphia, Pennsylvania 19103

Mrs. Lynn Young
1551 Tenth Avenue East
Seattle, Washington 98102

Appendix C

SACEM Research Project

Interview Instructions

You have been selected as one of five interviewers who will be making telephone interviews as part of a research project being managed by the Alban Institute, Inc., for a task force of the Society for the Advancement of Continuing Education for Ministry (SACEM). This set of instructions has been prepared so that the five interviewers will engage in a similar procedure. We ask that you follow these steps in your interviewing:

1. Make contact with the first two of your interviewees by telephone to get their agreement to be interviewed and to set a time for a one-hour or less telephone interview (use interview information below to explain what the research is all about). By each name we have listed the assessment method we understand the interviewee to have used sometime during 1976. Attached to these instructions are brief descriptions of the assessment methods.

2. Familiarize yourself with the draft paragraph below which the task force developed to describe the research to interviewees. Familiarize yourself with the attached sheets describing the different assessment methods different interviewees have used.

3. Take your first two names only. Telephone them, describe the project to them (they do not know anything about it), and ask their agreement to be interviewed, then set a mutually agreeable time for a longer conversation (up to an hour). Do not conduct the interview on this first telephone call.

   Note: We have found that some of these names are of people who have moved or who are difficult to locate. Please use reasonable attempts to locate them even if they have moved. If they cannot be found, go on to your next name, but let us know -- we can supply a substitute name.

4. At the appointed time, telephone them (station to station, if possible, to keep costs down) and conduct the interview, using the interview schedule provided here.

   Note: Encourage more than monosyllabic answers, where possible.

   Note: Take as full notes as possible on the interview form -- try not to interpret for the interviewee, but try to get as much verbatim as possible.

   Note: The scale universally used is from 1 for low to 10 for high. Be sure your interviewee is clear about that.

5. Type up your notes in duplicate, using the numbers of the questions on the questionnaire as the outline -- skipping several lines between questions.

6. Mail your hand-written notes from the telephone call and the two copies of typed notes to:

SACEM RESEARCH
The Alban Institute
Mount St. Alban
Washington, D.C. 20016

7. As quickly as possible, we will read over your notes and respond (probably on the telephone) to give you the go-ahead on your other 18 interviews and to make any suggestions we feel necessary on your method of write-up or interviewing.

8. At that point, we look for you to complete the 18 interviews using the steps #1 -- #5 above.

Note: At any point we will supply additional names if you need them.

Note: You may copy your report for your own use, if you wish, but the data and the forms are the property of SACEM.

You will be paid $50 for each completed interview carried out through these procedures, plus telephone costs. You will be paid for the interviews as we receive them, but you will have to let us know what the telephone calls cost.

DRAFT DESCRIPTIVE PARAGRAPH: The Society for Continuing Education for Ministry is inviting a group of people (just over 100, randomly selected) to help us learn about the processes now being developed to help clergy plan their continuing education. Our purpose in this study is to learn some things which will, we hope, enable such planning processes to be of greater value to people. We want to learn something of what has happened to these persons as a result of doing that planning, what prompted them to do it, and how they now feel about the overall process and the parts of it. For that, we ask for a telephone interview of less than an hour. The material from the interview will be used in a research context, with no names attached to any comment that is published. Each interviewee will be sent a copy of the finished report in the summer of 1978. Each interviewee is selected randomly and findings will be written up without the use of any interviewees names.

The task force is composed of eight members of SACEM, co-chaired by John Hendrickson of Auburn Theological Seminary in New York and Robert Reber of Scarritt College in Nashville. The task force project is being managed by the Alban Institute, Inc., a multi-denominational, non-profit corporation in Washington, D.C., directed by Loren B. Mead.)

Appendix D

SACEM INTERVIEW FORMAT

Area one: Your perception of behavior change resulting from assessment process.

Special Instructions:	Questions:
Use correct name of the process as you used it in the preliminary phone contact and as it appears on the sheet of names.	1. When and where did you participate in the Assessment process?
	2. How long did the whole thing take?
	3. Prior to that, had you engaged in any continuing education activities?
Probe further if "yes"	3.a. If so, what kind or types?
	4. Have you undertaken any continuing education as a result of the assessment?
Probe if appropriate	4.a. If yes, what kind or types?
	5. Do you currently have any future plans for continuing education based on that assessment?
Probe if appropriate	5.a. If yes, what kind or types?
	6. Do you now plan your continuing education differently because of the assessment?
Probe if appropriate	6.a. If yes, can you say how? In what ways?
	7. In the process you used, was there any kind of plan for follow-up?
Probe if appropriate. If "no" try to see if there were even informal agreements to follow up.	7.a. If so, what kind?
	8. Have there been any changes in your career as a result of it?

Special Instructions:

Questions:

9. Are you aware of any changes in how you work?

Give chance for response, then probe...

9.a. ...with lay people?

9.b. ...with other clergy?

Leave open-ended at first.

10. Have you found anything or anybody particularly helpful in following up on your continuing education plans since the assessment?

Now probe -- using for the first time a scale of "1" for "very low, bad, or unhelpful" to "10" for "very high, good, or helpful" -- be sure the interviewee understands the meaning of the scale, since we will be using it several times later.

10.a. On a scale of 1 (low) to 10 (high), how would you characterize the helpfulness of your bishop, judicatory executive, or denominational staff? _____

10.b. On the same scale, what about the officers and board of your congregation? _____

Area Two: How your system was related to your assessment process.

Special Instructions:

Questions:

11. How did you find out about the assessment process?

If not answered above: (write their answer in here, but don't repeat the question if they have answered it earlier)

12. How did you get into it?

13. What did you hope to get out of it?

14. On the scale of 1 (low) to 10 (high), how did it meet your hopes? _____

15. Did you know about other kinds of assessment processes?

Probe if appropriate

15.a. If so, why did you choose this one?

Probe if appropriate

15.b. If so, have you been in one of the others, either before or since?

16. Have you ever been a leader, facilitator, or organizer of an assessment yourself?

Probe if appropriate

16.a. If so, using what method?

This may be repetitive of what was said under 11 & 12 above. We particularly want to probe on How supportive the exec. was.

17. How does your judicatory executive (bishop, etc.) stand on using a process like this?

17.a. Probe: Did he or she pay for it, recruit for it, organize it, etc.?

(This is to determine if it was a group or individual exercise).

18. Did others go through the process with you?

18.a. If so, was it a group of relative strangers, or was it a group of colleagues you know and work with from time to time?

Area Three: The key elements in the process as seen by the interviewee.

Special Instructions:

Questions:

19. For you, what were the key procedures in the assessment process?

We will be using the scale several times, so you may want to refresh the interviewee on it.
Note: In this instance the scale is modified to allow a new response: "Not applicable".

20. We want to identify the parts of the thing that were most helpful, less so, or not applicable:

20.a. Check 1 (low) to 10 (high) -- with "X" for not applicable -- how would you rate the use of a facilitator or leader? _____

20.b. Similarly rate...use of special instruments, tests, or written designs: _____

20.c. As above...use of group settings or working groups _____

20.d. As above...the use of peer feedback _____

20.e. As above...the use of lay feedback _____

Area Four: The Interviewee's general evaluation of the assessment process.

Special Instructions:

These are questions to elicit feelings, judgements, opinions -- we expect subjectivity!

Questions:

21. How do you feel about having taken this assessment?

22. As an overall experience, how would you rate it on the 1-10 scale? _____

23. Have you ever recommended that others take part in an assessment like you did?

If appropriate, probe

23.a. If so, do you know whether or not they did?

24. How well do you feel you have used what you learned in the assessment process?

25. What was your key learning?

26. If I were planning to get into an assessment process, what advice would you give me?

Area Five: Statistical data on interviewees.

Special Instructions:

No "yes" or "no" answers, please: Probe beyond yes or no where applicable.

This may have been answered above under questions 11, 12, or 17 -- if so, don't repeat the question, but do write the data in on your report copy at this point also.

Questions:

27. Age? _____
28. Sex? _____
29. Race? _____
30. Marital status? _____
31. Children? _____ Number? _____
32. Ordained? _____
33. If so, when? _____
34. Graduate of a seminary? _____
35. If so, which? _____
36. Current position title:
37. How long in that position? _____
38. Multiple staff? _____
39. Who paid for the assessment process?
40. Does your current position provide time off for continuing education?
41. If so, how much?
42. Does your current position provide money for continuing education?
43. If so, how much?
44. If you are in a congregation-based ministry, what is the approximate budget of the congregation?

Area Six: Unfinished Business

Special Instructions:

Questions:

45. Is there anything you would like to say that has not already been covered?

46. Did you have any notes of the assessment process that you were able to refer to in preparing for this call?

Please thank the interviewee on behalf of SACEM. Refer to Interview manual to let them know what will happen to the data.

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 1: When did you participate in the assessment process?										
1971	1 1.1%		1 5%							
1972	1 1.1%				1 3.3%					
1973	1 1.1%	1 20%								
1974	3 3.3%	1 20%	2 10%							
1975	6 6.6%	1 20%			4 13.3%	1 20%				
1976	49 53.8%	1 20%	2 10%	9 90%	21 70%	4 80%	3 60%	2 100%	2 50%	5 50%
1977	16 17.6%	1 20%	4 20%	1 10%	3 10%		2 40%			5 50%
No answer	6 6.6%		5 25%		1 3.3%					
Still in program	8 8.8%		6 30%						2 50%	
Question 8: Have there been any changes in your career as a result of it?										
Yes	14 15.4%	2 40%	5 25%	2 20%	4 13.3%	1 20%				
No	65 71.4%	3 60%	12 60%	6 60%	22 73.3%	2 40%	5 100%	2 100%	4 100%	9 90%
Considering	5 5.5%		1 5%	1 10%	1 3.3%	1 20%				1 10%
No answer	6 6.6%		1 5%	1 10%	3 10%	1 20%				
Not applicable	1 1.1%		1 5%							

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 8a: Nature of career change										
Shift to another parish (no model change)	1 1.1%		1 5%							
Change in focus	12 13.2%	1 20%	5 25%	3 30%	3 10%					
Possible unspecified change	4 4.4%		1 5%		1 3.3%	1 20%				1 10%
Other	3 3.3%		1 5%	1 10%		1 20%				
Don't know	1 1.1%		1 5%							
No answer	5 5.5%			1 10%	3 10%	1 20%				
Not applicable	65 71.4%	4 80%	11 55%	5 50%	23 76.7%	2 40%	5 100%	2 100%	4 100%	9 90%
Question 9a: . . . with lay people?										
Greater sensitivity	22 24.2%	1 20%	9 45%	3 30%	3 10%	1 20%			3 75%	2 20%
Better relationship	12 13.2%	2 40%	3 15%	3 30%	4 13.3%					
Greater dialogue	10 11%		2 10%		4 13.3%		1 20%	1 50%		2 20%
Delegation of authority	4 4.4%	1 20%	1 5%		1 3.3%	1 20%				
Self awareness	11 12.1%				5 16.7%	1 20%	2 40%		1 25%	2 20%
No	13 14.3%			2 20%	6 20%	1 20%	1 20%			3 30%
Don't know	1 1.1%		1 5%							

	Total	A-F	A-M	B	C	D	E	F	G	H
No answer	8 8.8%		3 15%	2 20%	2 6.7%	1 20%				
Not applicable	10 11%	1 20%	1 5%		5 16.7%		1 20%	1 50%		1 10%
Question 9b: . . . with other clergy?										
Increased awareness of collegiality	16 17.6%	2 40%	3 15%	2 20%	5 16.7%	1 20%	1 20%	1 50%	1 25%	
Increased awareness of peer relationships	12 13.2%		3 15%	2 20%	4 13.3%	1 20%			2 50%	
Improved interpersonal relationships	17 18.7%	1 20%	3 15%	4 40%	6 20%		1 20%			2 20%
Mixed feelings, but positive	1 1.1%	1 20%								
Self awareness	6 6.6%				2 6.7%	1 20%	1 20%			2 20%
Better evaluation of clergy	3 3.3%				3 10%					
No	16 17.6%		5 25%	1 10%	3 10%	1 20%	1 20%			5 50%
Don't know	1 1.1%		1 5%							
No answer	9 9.9%		3 15%	1 10%	3 10%	1 20%			1 25%	
Not applicable	10 11%	1 20%	2 10%		4 13.3%		1 20%	1 50%		1 10%
Question 10a: On a scale of 1 to 10, how would you characterize the helpfulness of your bishop, judicatory executive, or denominational staff?										
1	3 3.3%	1 20%	1 5%		1 3.3%					
2	2 2.2%		2 10%							

	Total	A-F	A-M	B	C	D	E	F	G	H
2.5	1 1.1%						1 20%			
3	6 6.6%		5 25%		1 3.3%					
3.5	2 2.2%	1 20%				1 20%				
4	4 4.4%	1 20%			2 6.7%	1 20%				
5	6 6.6%		1 5%	2 20%	2 6.7%		1 20%			
6	8 8.8%		4 20%		1 3.3%		1 20%			2 20%
6.5	3 3.3%	1 20%	1 5%		1 3.3%					
7	7 7.7%		1 5%	1 10%	2 6.7%		1 20%	1 50%		1 10%
7.5	3 3.3%			1 10%						2 20%
8	16 17.6%		2 10%		9 30%	1 20%	1 20%	1 50%	2 50%	
8.5	1 1.1%				1 3.5%					
9	9 9.9%			1 10%	4 13.3%				1 25%	3 30%
9.5	2 2.2%			1 10%	1 3.3%					
10	16 17.6%	1 20%	3 15%	4 40%	4 13.3%	1 20%			1 25%	2 20%
Not applicable	2 2.2%				1 3.3%	1 20%				
Question 10b: On the same scale, what about the officers and board of your congregation?										
1	1 1.1%		1 5%							
3	5 5.5%		2 10%	2 20%		1 20%				
3.5	1 1.1%			1 10%						
4	2 2.2%							1 50%		1 10%
5	11 12.1%	1 20%	3 15%		4 13.3%		1 20%			2 20%

	Total	A-F	A-M	B	C	D	E	F	G	H
6	4 4.4%				2 6.7%		1 20%		1 25%	
6.5	1 1.1%					1 20%				
7	15 16.5%		3 15%		8 26.7%	1 20%	1 20%			2 20%
7.5	2 2.2%				2 6.7%					
8	11 12.1%	1 20%	2 10%	3 30%	3 10%				1 25%	1 10%
8.5	5 5.5%	1 20%	1 5%		1 3.3%		1 20%			1 10%
9	11 12.1%		4 20%	1 10%	3 10%		1 20%	1 50%		1 10%
9.5	1 1.1%				1 3.3%					
10	12 13.2%	2 40%	3 15%	1 10%	2 6.7%	1 20%			2 50%	1 10%
Not applicable	8 8.8%		1 5%	2 20%	4 13.3%	1 20%				
No answer	1 1.1%									1 10%
Question 12: How did you get into it?										
Request	3 3.3%				1 3.3%			2 100%		
Interest	24 26.4%	2 40%	7 35%	2 20%	8 26.7%	2 40%	2 40%			1 10%
Encouragement	7 7.7%		2 10%	2 20%	2 6.7%				1 25%	
Requirement	11 12.1%	1 20%	1 5%	1 10%	4 13.3%	3 60%			1 25%	
Information	7 7.7%	2 40%	1 5%	1 10%	3 10%					
Need assessment	8 8.8%		4 20%	2 20%	2 6.7%					

	Total	A-F	A-M	B	C	D	E	F	G	H
Invitation	14 15.4%		2 10%	1 10%	5 16.7%					6 60%
Combination	1 1.1%		1 5%							
Volunteered	13 14.3%			1 10%	5 16.7%		2 40%		2 50%	3 30%
No answer	3 3.3%		2 10%				1 20%			
Question 14: On the scale of 1 to 10, how did it meet your hopes?										
2	1 1.1%						1 20%			
3.5	1 1.1%									1 10%
4	2 2.2%		1 5%			1 20%				
5	3 3.3%	1 20%			1 3.3%					1 10%
5.5	2 2.2%				1 3.3%					1 10%
6	4 4.4%			1 10%		1 20%		1 50%		1 10%
7	17 18.7%		4 20%	1 10%	6 20%	1 20%			2 50%	3 30%
7.5	2 2.2%				2 6.7%					
8	19 20.9%	2 40%	3 15%	3 30%	8 26.7%				1 25%	2 20%
8.5	5 5.5%		1 5%		3 10%					1 10%
9	14 15.4%		3 15%	3 30%	4 13.3%		4 80%			
9.5	3 3.3%		1 5%		1 3.3%	1 20%				
10	15 16.5%	2 40%	5 25%	2 20%	4 13.3%			1 50%	1 25%	
Not applicable	2 2.2%		1 5%			1 20%				
No answer	1 1.1%		1 5%							

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 15: Did you know about other hinds of assessment processes?										
Yes	30 33%	4 80%	6 30%	3 30%	11 36.7%		2 40%		2 50%	2 20%
Yes, qualified	19 20.9%	1 20%	7 35%	1 10%	5 16.7%		1 20%	1 50%		3 30%
No	25 27.5%		4 20%	4 40%	8 26.7%	3 60%	1 20%		1 25%	4 40%
No, qualified	17 18.7%		3 15%	2 20%	6 20%	2 40%	1 20%	1 50%	1 25%	1 10%
Question 15b: If so, have you been in one of the others, either before or since?										
Yes	2 2.2%		1 5%		1 3.3%					
No	51 56%	3 60%	6 30%	7 70%	19 63.3%	3 60%	3 60%	1 50%	4 100%	5 50%
Required assessment	3 3.3%		1 5%			2 40%				
Prior involvement in workshops/ed. programs	11 12.1%		7 35%		2 6.7%		1 20%			1 10%
Career counseling	2 2.2%	1 20%			1 3.3%					
Denominational information	1 1.1%	1 20%								
Similar program	3 3.3%			2 20%	1 3.3%					
No answer	3 3.3%		2 10%		1 3.3%					
Not applicable	15 16.5%		3 15%	1 10%	5 16.7%		1 20%	1 50%		4 40%

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 16: Have you ever been a leader, facilitator, or organizer of an assessment yourself?										
Yes	18 19.8%	2 40%	7 35%	2 20%	6 20%					1 10%
Yes, qualified	3 3.3%		1 5%		1 3.3%		1 20%			
No	62 68.1%	1 20%	10 50%	8 80%	21 70%	5 100%	3 60%	2 100%	4 100%	8 80%
No, qualified	8 8.8%	2 40%	2 10%		2 6.7%		1 20%			1 10%
Question 16a: If so, using what method?										
Guide for Continuing Growth	1 1.1%		1 5%							
Lancaster program	3 3.3%				3 10%					
Staff programs	1 1.1%		1 5%							
Work with congregation and pastors	4 4.4%			1 10%	1 3.3%		1 20%			1 10%
Any other program in test group	1 1.1%			1 10%						
Help...skills, strengths, weaknesses	1 1.1%		1 5%							
Cont. ed. groups of clergy	3 3.3%		2 10%		1 3.3%					
Self-designed	3 3.3%		2 10%		1 3.3%					
Not applicable	74 81.3%	5 100%	13 65%	8 80%	24 80%	5 100%	4 80%	2 100%	4 100%	9 90%

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 17: How does your judicatory executive stand on using a process like this?										
Favorable	66 72.5%	2 40%	10 50%	9 90%	24 80%	3 60%	4 80%	1 50%	3 75%	10 100%
Unfavorable	6 6.6%		5 25%		1 3.3%					
Don't know, but favorable	5 5.5%	1 20%	1 5%		1 3.3%			1 50%	1 25%	
Requirement	2 2.2%			1 10%		1 20%				
Non commital	6 6.6%	2 40%	1 5%		2 6.7%	1 20%				
Mixed favorable & unfavorable	3 3.3%		2 10%				1 20%			
Don't know	2 2.2%		1 5%		1 3.3%					
No answer	1 1.1%				1 3.3%					
Question 17a: What was their actual participation?										
Paid for process partially or fully	46 50.5%	4 80%	6 30%	9 90%	18 60%	1 20%	3 60%	1 50%	1 25%	3 30%
Recommendation, encouragement	16 17.6%		3 15%	1 10%	4 13.3%	1 20%	2 40%			5 50%
No help in payment	8 8.8%	1 20%	1 5%		3 10%	2 40%				1 10%
None - no... mention	7 7.7%		6 30%		1 3.3%					
No fee	2 2.2%		1 5%					1 50%		
No	6 6.6%				2 6.7%	1 20%			2 50%	1 10%
No answer	5 5.5%		2 10%		2 6.7%				1 25%	
Not applicable	1 1.1%		1 5%							

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 20: We want to identify the parts that were most helpful, less so, or not applicable, on a 1 to 10 scale. Question 20a: How would you rate the use of a facilitator or leader?										
No answer	1 1.1%		1 5%							
4	2 2.2%		1 5%			1 20%				
5	1 1.1%									1 10%
6	3 3.3%		1 5%		1 3.3%					1 10%
6.5	1 1.1%				1 3.3%					
7	8 8.8%		1 5%	1 10%	2 6.7%		1 20%		2 50%	1 10%
7.5	3 3.3%		1 5%	1 10%		1 20%				
8	20 22%		5 25%	4 40%	5 16.7%	1 20%	1 20%		1 25%	3 30%
8.5	3 3.3%		1 5%			1 20%				1 10%
9	20 22%	2 40%	1 5%	2 20%	9 30%	1 20%	2 40%		1 25%	2 20%
9.5	3 3.3%	1 20%		1 10%	1 3.3%					
10	20 22%	2 40%	4 20%	1 10%	11 36.7%		1 20%			1 10%
Not applicable	6 6.6%		4 20%					2 100%		

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 20b: Similarly rate the use of special instruments, tests, or written designs.										
4	4 4.4%		2 10%		2 6.7%					
4.5	1 1.1%									1 10%
5	4 4.4%		2 10%	1 10%	1 3.3%					
6	5 5.5%		2 10%		1 3.3%	2 40%				
7	17 18.7%	1 20%	3 15%		4 13.3%	1 20%	2 40%	1 50%	2 50%	3 30%
7.5	2 2.2%	1 20%		1 10%						
8	24 26.4%	1 20%	6 30%	1 10%	8 26.7%	1 20%	2 40%	1 50%	1 25%	3 30%
8.5	1 1.1%				1 3.3%					
9	15 16.5%	1 20%	1 5%	5 50%	6 20%					2 20%
9.5	3 3.3%			1 10%	2 6.7%					
10	6 6.6%			1 10%	4 13.3%				1 25%	
Not applicable	8 8.8%	1 20%	3 15%		1 3.3%	1 20%	1 20%			1 10%
No answer	1 1.1%		1 5%							
Question 20c: As above, rate the use of group settings or working groups.										
5	3 3.3%					1 20%	1 20%		1 25%	
6	6 6.6%			1 10%	3 10%		1 20%			1 10%
6.5	1 1.1%					1 20%				

	Total	A-F	A-M	B	C	D	E	F	G	H
7	12 13.2%	2 40%	5 25%		2 6.7%	2 40%			1 25%	
7.5	2 2.2%			1 10%						1 10%
8	27 29.7%		5 25%	3 30%	14 46.7%				1 25%	4 40%
8.5	3 3.3%			1 10%	2 6.7%					
9	14 15.4%	3 60%	1 5%	2 20%	4 13.3%	1 20%	2 40%			1 10%
10	14 15.4%		2 10%	2 20%	5 16.7%		1 20%		1 25%	3 30%
No answer	1 1.1%		1 5%							
Not applicable	8 8.8%		6 30%					2 100%		
Question 20d: As above, rate the use of peer feedback.										
3	3 3.3%	1 20%	1 5%			1 20%				
4	1 1.1%		1 5%							
5	4 4.4%	1 20%	1 5%		1 3.3%		1 20%			
6	4 4.4%		1 5%	1 10%	2 6.7%					
6.5	1 1.1%		1 5%							
7	10 11%		3 15%	1 10%	2 6.7%	1 20%	2 40%		1 25%	
7.5	1 1.1%				1 3.3%					
8	28 30.8%		6 30%	3 30%	9 30%	2 40%	1 20%		1 25%	6 60%

	Total	A-F	A-M	B	C	D	E	F	G	H
8.5	5 5.5%			2 20%	2 5.7%		1 20%			
9	14 15.4%		1 5%	3 30%	7 23.3%				2 50%	1 10%
10	13 14.3%	2 40%	3 15%		6 20%					2 20%
No answer	2 2.2%	1 20%	1 5%							
Not applicable	5 5.5%		1 5%			1 20%		2 100%		1 10%
Question 20e: As above, rate the use of lay feedback.										
4	1 1.1%								1 25%	
5	6 6.6%		2 10%	1 10%	2 6.7%					1 10%
6	2 2.2%		1 5%	1 10%						
7	5 5.5%		2 10%				1 20%			2 20%
8	11 12.1%	1 20%	6 30%	1 10%		1 20%	1 20%			1 10%
8.5	2 2.2%					1 20%				1 10%
9	10 11%	1 20%	4 20%		2 6.7%				1 25%	2 20%
9.5	1 1.1%									1 10%
10	8 8.8%	2 40%	3 15%	1 10%					1 25%	1 10%
No answer	1 1.1%		1 5%							
Not applicable	44 48.4%	1 20%	1 5%	6 60%	26 86.7%	3 60%	3 60%	2 100%	1 25%	1 10%

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 22: As an overall experience, how would you rate it on the 1 - 10 scale?										
2.2	1 1.1%					1 20%				
4	2 2.2%		1 5%	1 10%						
5	3 3.3%	1 20%	1 5%			1 20%				
6	3 3.3%		1 5%		1 3.3%			1 50%		
6.5	1 1.1%									1 10%
7	15 16.5%		2 10%	1 10%	5 16.7%	2 40%	2 40%			3 30%
7.5	1 1.1%		1 5%							
8	25 27.5%	1 20%	6 30%	3 30%	10 33.3%				2 50%	3 30%
8.5	4 4.4%	1 20%	1 5%		1 3.3%					1 10%
9	19 20.9%	1 20%	2 10%	3 30%	8 26.7%		2 40%	1 50%	1 25%	1 10%
9.5	1 1.1%						1 20%			
10	14 15.4%	1 20%	3 15%	2 20%	5 16.7%	1 20%			1 25%	1 10%
No answer	1 1.1%		1 5%							
Not applicable	1 1.1%		1 5%							
Question 23: Have you ever recommended that others take part in an assessment like you did?										
Yes	63 69.2%	3 60%	16 80%	6 60%	24 80%	1 20%	2 40%		3 75%	8 80%

	Total	A-F	A-M	B	C	D	E	F	G	H
Yes, nonspecific	3 3.3%	1 20%				1 20%	1 20%			
Yes, specific individuals	7 7.7%	1 20%		2 20%	1 3.3%		2 40%			1 10%
No	17 18.7%		3 15%	2 20%	5 16.7%	3 60%		2 100%	1 25%	1 10%
No answer	1 1.1%		1 5%							
Question 23a: If so, do you know whether or not they did?										
No	16 17.6%	3 60%	5 25%		2 6.7%		2 40%		2 50%	2 20%
Not on recommendation, but on own enthusiasm	1 1.1%				1 3.3%					
No, but they may or will	3 3.3%	1 20%			1 3.3%				1 25%	
Yes, specific	16 17.6%		4 20%	3 30%	8 26.7%					1 10%
Yes, nonspecific	8 8.8%		1 5%	3 30%	3 10%	1 20%				
Don't know	29 31.9%	1 20%	6 30%	2 20%	10 33.3%	1 20%	3 60%			6 60%
No answer	1 1.1%		1 5%							
Not applicable	17 18.7%		3 15%	2 20%	5 16.7%	3 60%		2 100%	1 25%	1 10%
Question 26: If I were planning to get into an assessment process, what advice would you give me?										
Challenges, self appreciation in non-threatening atmosphere	5 5.5%		1 5%	1 10%	3 10%					
Objective, impersonal approach	1 1.1%			1 10%						

	Total	A-F	A-M	B	C	D	E	F	G	H
Careful choice of consultant and honesty, frankness	10 11%	2 40%	2 10%		3 10%				1 25%	2 20%
Careful review of printed materials or talk with leader	11 12.1%		3 15%	1 10%	5 16.7%		1 20%		1 25%	
Openness, relaxed	8 8.8%		1 5%	1 10%	4 13.3%	1 20%	1 20%			
Self evaluation	19 20.9%	1 20%	2 10%	2 20%	4 13.3%	3 60%	2 40%	1 50%		4 40%
Vague but positive	24 26.4%	1 20%	3 15%	3 30%	10 33.3%	1 20%	1 20%	1 50%	1 25%	3 30%
Commitment	9 9.9%		6 30%	1 10%	1 3.3%				1 25%	
Negative	2 2.2%	1 20%								1 10%
No answer	2 2.2%		2 10%							
Question 27: Age?										
25	1 1.1%				1 3.3%					
27	1 1.1%				1 3.3%					
29	2 2.2%		2 10%							
30	7 7.7%		1 5%	1 10%	3 10%	1 20%				1 10%
31	5 5.5%		1 5%	1 10%	1 3.3%		1 20%		1 25%	
32	2 2.2%			1 10%		1 20%				
33	3 3.3%		1 5%		1 3.3%		1 20%			
34	4 4.4%		1 5%			2 40%				1 10%
35	3 3.3%		1 5%	1 10%	1 3.3%					
36	2 2.2%								1 25%	1 10%

	Total	A-F	A-M	B	C	D	E	F	G	H
37	2 2.2%	1 20%								1 10%
38	2 2.2%			1 10%						1 10%
39	4 4.4%	1 20%	1 5%				1 20%			1 10%
40	3 3.3%			1 10%	1 3.3%	1 20%				
41	8 8.8%	3 60%	1 5%		3 10%		1 20%			
42	2 2.2%							1 50%	1 25%	
43	2 2.2%		1 5%							1 10%
44	4 4.4%			1 10%	3 10%					
45	3 3.3%		1 5%		1 3.3%					1 10%
46	1 1.1%				1 3.3%					
47	2 2.2%				2 6.7%					
48	6 6.6%		1 5%	1 10%	2 6.7%		1 20%	1 50%		
49	2 2.2%		1 5%							1 10%
50	1 1.1%		1 5%							
51	2 2.2%			1 10%	1 3.3%					
52	1 1.1%		1 5%							
53	2 2.2%				2 6.7%					
54	4 4.4%		1 5%		1 3.3%				1 25%	1 10%
56	3 3.3%		1 5%		2 6.7%					
57	1 1.1%		1 5%							
62	3 3.3%			1 10%	2 6.7%					

	Total	A-F	A-M	B	C	D	E	F	G	H
64	2 2.2%		1 5%		1 3.3%					
74	1 1.1%		1 5%							
Question 28: Sex?										
Female	4 4.4%				4 13.3%					
Male	87 95.6%	5 100%	20 100%	10 100%	26 86.7%	5 100%	5 100%	2 100%	4 100%	10 100%
Question 29: Race?										
White	90 98.9%	5 100%	20 100%	9 90%	30 100%	5 100%	5 100%	2 100%	4 100%	10 100%
Black	1 1.1%			1 10%						
Question 30: Marital status?										
Single	20 22%		1 5%	10 100%	9 30%					
Married	70 76.9%	5 100%	19 95%		21 70%	4 80%	5 100%	2 100%	4 100%	10 100%
Divorced	1 1.1%					1 20%				
Question 31: Number of children.										
1	10 11%		5 25%		2 6.7%	1 20%	1 20%		1 25%	
2	24 26.4%	2 40%	5 25%		9 30%		2 40%		2 50%	4 40%
3	18 19.8%	2 40%	4 20%		6 20%	1 20%	1 20%	1 50%		3 30%
4	11 12.1%	1 20%	3 15%		3 10%	1 20%	1 20%	1 50%	1 25%	
5	6 6.6%		2 10%		1 3.3%					3 30%
None	22 24.2%		1 5%	10 100%	9 30%	2 40%				

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 32: Ordained?										
Yes	83 91.2%	5 100%	20 100%	10 100%	23 76.7%	4 80%	5 100%	2 100%	4 100%	10 100%
No	8 8.8%				7 23.3%	1 20%				
Question 33: Date of ordination.										
1932	1 1.1%		1 5%							
1937	1 1.1%				1 3.3%					
1938	1 1.1%		1 5%							
1940	1 1.1%			1 10%						
1943	1 1.1%				1 3.3%					
1945	2 2.2%				2 6.7%					
1948	1 1.1%									1 10%
1949	1 1.1%		1 5%							
1950	1 1.1%				1 3.3%					
1952	1 1.1%			1 10%						
1953	3 3.3%		2 10%							1 10%
1954	4 4.4%		1 5%		1 3.3%		1 20%		1 25%	
1955	2 2.2%				1 3.3%			1 50%		
1956	2 2.2%				2 6.7%					
1957	1 1.1%									1 10%
1958	1 1.1%		1 5%							

	Total	A-F	A-M	B	C	D	E	F	G	H
1959	3 3.3%		1 5%		2 6.7%					
1960	2 2.2%				2 6.7%					
1961	7 7.7%	1 20%	1 5%	1 10%	1 3.3%			1 50%	1 25%	1 10%
1962	4 4.4%		1 5%	1 10%	2 6.7%					
1963	4 4.4%	2 40%	1 5%				1 20%			
1964	2 2.2%	1 20%	1 5%							
1965	2 2.2%		1 5%							1 10%
1966	2 2.2%	1 20%		1 10%						
1967	4 4.4%		1 5%		1 3.3%					2 20%
1968	2 2.2%									2 20%
1969	2 2.2%					1 20%			1 25%	
1970	4 4.4%		1 5%	2 20%	1 3.3%					
1971	2 2.2%			1 10%					1 25%	
1972	1 1.1%			1 10%						
1973	9 9.9%		2 10%		4 13.3%		2 40%			1 10%
1974	4 4.4%		3 15%		1 3.3%					
1975	2 2.2%			1 10%			1 20%			
1976	1 1.1%					1 20%				
1977	2 2.2%					2 40%				
Not applicable	8 8.8%				7 23.3%	1 20%				

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 34: Graduate of a seminary?										
Yes	84 92.3%	5 100%	20 100%	10 100%	23 76.7%	5 100%	5 100%	2 100%	4 100%	10 100%
No	6 6.6%				6 20%					
Not applicable	1 1.1%				1 3.3%					
Question 35: Location of seminary.										
Massachusetts	5 5.5%	1 20%	1 5%		2 6.7%			1 50%		
Connecticut	2 2.2%		1 5%		1 3.3%					
New York	2 2.2%		1 5%		1 3.3%					
New Jersey	7 7.7%				7 23.3%					
Pennsylvania	7 7.7%	1 20%	1 5%		3 10%				2 50%	
Washington, D.C.	2 2.2%				2 6.7%					
Maryland	7 7.7%			7 70%						
Virginia	1 1.1%		1 5%							
Georgia	2 2.2%		1 5%				1 20%			
South Carolina	4 4.4%		1 5%				3 60%			
North Carolina	3 3.3%	2 40%		1 10%						
Kentucky	2 2.2%		1 5%		1 3.3%					
Texas	4 4.4%				3 10%				1 25%	

	Total	A-F	A-M	B	C	D	E	F	G	H
Michigan	4 4.4%	1 20%	2 10%		1 3.3%					
Ohio	9 9.9%		2 10%	1 10%		5 100%	1 20%			
Indiana	4 4.4%		3 15%							1 10%
Illinois	8 8.8%		4 20%		1 3.3%				1 25%	2 20%
Missouri	5 5.5%				1 3.3%			1 50%		3 30%
Nebraska	1 1.1%									1 10%
Kansas	1 1.1%		1 5%							
Minnesota	2 2.2%									2 20%
Iowa	1 1.1%									1 10%
Out of country	1 1.1%			1 10%						
Not applicable	7 7.7%				7 23.3%					
Question 36: What is your current position title?										
Rector, pastor	70 76.9%	5 100%	16 80%	10 100%	14 46.6%	4 80%	5 100%	2 100%	4 100%	10 100%
Associate or assistant rector or pastor	3 3.3%		1 5%		2 6.7%					
Educator, teacher, professor	6 6.6%				6 20%					
Counsellor, chaplain	3 3.3%		2 10%		1 3.3%					
Interim minister	1 1.1%		1 5%							
Judicatory official	3 3.3%				3 10%					
Other	5 5.5%				4 13.3%	1 20%				

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 37: How long have you been in that position?										
1 year	16 17.6%	1 20%	3 15%	5 50%	4 13.3%	1 20%			1 25%	1 10%
2 years	12 13.2%		2 10%	2 20%	5 16.7%	3 60%				
3 years	9 9.9%		2 10%		5 16.7%		1 20%	1 50%		
4 years	20 22%		7 35%	3 30%	2 6.7%	1 20%	2 40%		2 50%	3 30%
5 years	4 4.4%				3 10%					1 10%
6 years	8 8.8%	2 40%	3 15%		2 6.7%					1 10%
7 years	2 2.2%				1 3.3%		1 20%			
8 years	5 5.5%	1 20%			1 3.3%			1 50%		2 20%
9 years	4 4.4%	1 20%			1 3.3%				1 25%	1 10%
10 years	3 3.3%				3 10%					
12 years	5 5.5%		1 5%		3 10%		1 20%			
14 years	2 2.2%		1 5%							1 10%
16 years	1 1.1%		1 5%							
Question 38: Do you have multiple staff?										
Yes	35 38.5%		9 45%	10 100%	14 46.7%	1 20%			1 25%	
No	55 60.4%	5 100%	11 55%		15 50%	4 80%	5 100%	2 100%	3 75%	10 100%
Not applicable	1 1.1%				1 3.3%					

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 39: Who paid for the assessment process?										
Free	10 11%	2 40%	6 30%					2 100%		
Judicatory/denomination	17 18.7%	1 20%	2 10%	5 50%	8 26.7%					1 10%
Ecumenical group	1 1.1%		1 5%							
Seminary, university center	3 3.3%		1 5%				2 40%			
Parish	12 13.2%	1 20%	2 10%	2 20%	3 10%				1 25%	3 30%
Province	7 7.7%			1 10%	6 20%					
Personal expense	17 18.7%	1 20%	4 20%		3 10%	4 80%			2 50%	3 30%
Foundation grant	3 3.3%				1 3.3%		2 40%			
Mixed funding	17 18.7%		2 10%	2 20%	7 23.3%	1 20%	1 20%		1 25%	3 30%
No answer	4 4.4%		2 10%		2 6.7%					
Question 40: Does your present position provide time off for continuing education?										
Yes	80 87.9%	5 100%	18 90%	10 100%	24 80%	5 100%	3 60%	2 100%	4 100%	9 90%
No	10 11%		2 10%		5 16.7%		2 40%			1 10%
Not applicable	1 1.1%				1 3.3%					

	Total	A-F	A-M	B	C	D	E	F	G	H
Question 41: If so, how much?										
7 days	5 5.5%		1 5%	2 20%		1 20%				1 10%
10 days	2 2.2%		1 5%			1 20%				
14 days	37 40.7%	3 60%	9 45%	5 50%	11 36.7%		1 20%		1 25%	7 70%
18 days	1 1.1%								1 25%	
21 days	2 2.2%				2 6.7%					
22 days	1 1.1%			1 10%						
26 days	1 1.1%				1 3.3%					
30 days	4 4.4%	1 20%	1 5%		2 6.7%					
42 days	2 2.2%				1 3.3%				1 25%	
52 days	1 1.1%		1 5%							
90 days	1 1.1%				1 3.3%					
104 or more days	1 1.1%					1 20%				
No answer	3 3.3%	1 20%			1 3.3%	1 20%				
Flexible	23 25.3%		4 20%	2 20%	8 26.7%	1 20%	3 60%	2 100%	1 25%	2 20%
Not applicable	7 7.7%		3 15%		3 10%		1 20%			
Question 42: Does your current position provide money for continuing education?										
Yes	73 80.2%	3 60%	14 70%	10 100%	24 80%	5 100%	4 80%		3 75%	10 100%
No	18 19.8%	2 40%	6 30%		6 20%		1 20%	2 100%	1 25%	

Question 43: If so, how much?	Total	A-F	A-M	B	C	D	E	F	G	H
$50	2 2.2%					1 20%	1 20%			
$75	1 1.1%				1 3.3%					
$100	3 3.3%						1 20%		1 25%	1 10%
$150	1 1.1%				1 3.3%					
$200	16 17.6%	2 40%	4 20%	1 10%	2 6.7%		2 40%			5 50%
$250	13 14.3%	1 20%	2 10%	6 60%	4 13.3%					
$275	1 1.1%			1 10%						
$300	5 5.5%			1 10%	2 6.7%	1 20%				1 10%
$320	1 1.1%				1 3.3%					
$350	5 5.5%		3 15%	1 10%	1 3.3%					
$450	2 2.2%				1 3.3%					1 10%
$500	5 5.5%		3 15%		2 6.7%					
$700	1 1.1%				1 3.3%					
$725	1 1.1%		1 5%							
$825	1 1.1%								1 25%	
More than $997	1 1.1%								1 25%	
No answer	12 13.2%		1 5%		8 26.7%	2 40%				1 10%
Use vacation	1 1.1%	1 20%								
None	19 20.9%	1 20%	6 30%		6 20%	1 20%	1 20%	2 100%	1 25%	1 10%

Question 44: If you are in a congregation-based ministry, what is the approximate budget of the congregation.	Total	A-F	A-M	B	C	D	E	F	G	H
$7,000	1 1.1%		1 5%							
$12,000	1 1.1%				1 3.3%					
$15,000	1 1.1%		1 5%							
$20,000	3 3.3%				1 3.3%	1 20%	1 20%			
$23,000	1 1.1%						1 20%			
$24,000	1 1.1%					1 20%				
$25,500	1 1.1%							1 50%		
$28,000	1 1.1%			1 10%						
$30,000	2 2.2%			1 10%	1 3.3%					
$32,000	1 1.1%									1 10%
$33,000	2 2.2%				1 3.3%	1 20%				
$34,000	1 1.1%		1 5%							
$35,000	1 1.1%								1 25%	
$36,000	1 1.1%		1 5%							
$37,000	1 1.1%									1 10%
$38,000	1 1.1%						1 20%			
$40,000	1 1.1%				1 3.3%					
$41,000	1 1.1%									1 10%
$42,000	2 2.2%		1 5%					1 50%		

	Total	A-F	A-M	B	C	D	E	F	G	H
$42,700	1 1.1%									1 10%
$43,000	1 1.1%						1 20%			
$45,000	1 1.1%				1 3.3%					
$46,000	1 1.1%		1 5%							
$48,000	1 1.1%	1 20%								
$50,000	2 2.2%				2 6.7%					
$52,000	1 1.1%									1 10%
$53,000	1 1.1%		1 5%							
$54,000	1 1.1%			1 10%						
$55,000	1 1.1%			1 10%						
$55,237	1 1.1%		1 5%							
$56,000	1 1.1%	1 20%								
$58,000	1 1.1%			1 10%						
$60,000	3 3.3%				1 3.3%		1 20%		1 25%	
$62,000	1 1.1%									1 10%
$63,000	1 1.1%									1 10%
$65,000	1 1.1%	1 20%								
$70,000	1 1.1%	1 20%								
$75,000	1 1.1%			1 10%						
$79,000	1 1.1%									1 10%

	Total	A-F	A-M	B	C	D	E	F	G	H
$80,000	4 4.4%		1 5%	1 10%	1 3.3%					1 10%
$81,000	1 1.1%		1 5%							
$90,000	1 1.1%			1 10%						
$95,000	2 2.2%		1 5%		1 3.3%					
$100,000	3 3.3%				2 6.7%				1 25%	
$102,000	1 1.1%				1 3.3%					
$110,000	2 2.2%				1 3.3%					1 10%
$112,000	1 1.1%	1 20%								
$115,000	1 1.1%		1 5%							
$119,000	1 1.1%								1 25%	
$130,000	1 1.1%				1 3.3%					
$135,000	1 1.1%					1 20%				
$137,500	1 1.1%				1 3.3%					
$140,000	1 1.1%			1 10%						
$150,000	1 1.1%		1 5%							
$190,000	1 1.1%		1 5%							
$195,000	1 1.1%		1 5%							
$200,000	2 2.2%		1 5%	1 10%						
$216,000	1 1.1%		1 5%							
$400,000	1 1.1%		1 5%							
Not applicable	16 17.6%		2 10%		13 43,3%	1 20%				

Question 46: Did you have any notes of the assessment process that you referred to in preparing for this call?	Total	A-F	A-M	B	C	D	E	F	G	H
Yes	24 26.4%	2 40%	4 20%	1 10%	12 40%			2 100%	1 25%	2 20%
No	59 64.8%	3 60%	13 65%	8 80%	16 53.3%	5 100%	4 80%		3 75%	7 70%
No answer	8 8.8%		3 15%	1 10%	2 6.7%		1 20%			1 10%